

Qatar Second National Development Strategy 2018~2022



استراتيجية التنمية الوطنية
National Development Strategy

Qatar Second National Development Strategy 2018~2022



وزارة التخطيط والتعاون الدولي والإحصاء
Ministry of Development Planning and Statistics

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Forward

I am honored to present to the citizens and residents of Qatar the second National Development Strategy (NDS-2) 2018-2022, which comes as a continuation of the series of national strategies aimed at achieving the goals and aspirations of Qatar National Vision 2030 that in turn aims at transforming Qatar into an advanced country by 2030, capable of sustaining its own development and ensuring high living standards for its people for generations to come.

This major achievement is the result of the efforts of all stakeholders in the Qatari society, led by the Ministry of Development Planning and Statistics with the participation of other ministries and government agencies, the private sector, civil society organizations and educational institutions. The Council of Ministers, under the auspices and support of our wise and prudent leadership, followed-up the development process and infinitely supported these efforts. The lessons learned from the development and implementation of the first National Development Strategy 2011-2016 were examined and analyzed to enhance the performance of the second Strategy programs and projects. Ensuring and maintaining commitment by the implementing agencies require highlighting the key focus areas in NDS-2, mainly:

- Focusing on human beings as the development tool and ultimate goal at the same time. A cornerstone of this Strategy is thus a thematic report on Population, Labour and Sustainable Development that essentially addresses the interactive relationship between population and development, taking into account the humanitarian, human and social requirements of the population, mostly expatriate labour, whose number has multiplied with an annual growth rate of 10% in the last decade. The State provides them with integrated public services to ensure security, health and decent living for them and their families. This significant increase is closely linked to the many development projects that Qatar is handling at various levels.
- Clear agreed-upon national priorities to enhance the feasibility of NDS programs and projects.
- Clear and realistic NDS results and targets. Unrealistic results and vague targets would result in ambiguous activities that waste resources and efforts and yield poor outputs.
- Clear roles and responsibilities of program and project implementers, that set a basis for funding, a platform for activities and a springboard for accountability. Without such clarity, activities might mix up and responsibilities overlap, weakening the NDS outcome and gains from plans, programs and projects.
- Strong linkage between strategies and national budget planning and monitoring, so that planning does not become a mere formality as HH the Emir of Qatar noted in his speech at the opening of the 43th session of the Shura Council on November 11, 2014:

“I would like to emphasize here that plans are not a matter of completing a formality; they are designed to be implemented. They need to be carefully designed, be given due consideration and be implementable within the resources including available funding. Our institutions, in turn, should respect the set plan and be accountable against its objectives.”

- Improved monitoring and follow-up mechanisms. There is a full chapter on the follow-up of NDS performance including the establishment of an integrated monitoring and follow-up system, and reporting on progress to enable performance control, prevent bottlenecks and take necessary corrective actions on a timely basis.

- Ensuring the modernization and development of public administration since it assumes the greatest responsibility of implementing the Strategy and achieving its results and objectives, and providing central services necessary for implementation, mainly financial, human and technological services and legislative support.
- An integrated communication strategy with a clear and comprehensive coordination mechanism within the same sector and among NDS sectors and stakeholders.

In conclusion, I would like to stress that the government will spare no effort to overcome all NDS implementation obstacles. We have no choice but to work tirelessly in accordance with pre-agreed strategies and plans, and we all know the outcome we must gain as a result of our efforts, cooperation and hard work.

Abdullah bin Nasser Al Thani

Prime Minister

Preface

The Qatar National Vision 2030 (QNV 2030) is a working manual supported by guidance from the State's leadership. Launched in October 2008 and ratified under Emiri Decision No. 44 of 2008, the QNV 2030 aims at transforming Qatar into an advanced country capable of sustaining its own development and ensuring high living standards for its people for generations to come by seeking to develop a diversified economy coupled with diminishing dependence on hydrocarbons, where investment is moving towards a knowledge-based economy and the private sector is growing in importance.. The QNV provides a framework for national development strategies, trends and available options, reflecting the aspirations and culture of Qatari people. It also aims to strike a balance among economic growth, social and human development, and environmental protection.

The QNV 2030 identifies five main challenges: modernization and preservation of traditions; balance between the needs of this generation and those of future generations; managed growth and uncontrolled expansion; the size and quality of the expatriate labor force and the selected path of development; and economic growth, social development and environmental management.

The National Development Strategy 2011-2016 (NDS-1), the first comprehensive development strategy in Qatar aimed at achieving QNV 2030 goals of a sustainable and balanced growth, sought to establish major values, including value-for-cost through responsible use of oil and human resources, developing and modernizing government institutions to ensure efficient performance, ensuring a governance of development programs and projects, and providing high quality public services. The NDS-1 was based on QNV 2030 pillars, targeting: sustained economic prosperity, promotion of human development, integrated methodology for social development, and environmental preservation for future generations (sustainable environment). In terms of solutions, NDS-1 contained eight chapters drawn up from 14 sector strategies.

A major achievement of the NDS-1 is that it created a national culture of development planning across all government entities and other development stakeholders. It provided a national framework for the planning process; helped build the capacity of human resources and technical expertise in project management and implementation; raised awareness of the importance of monitoring and evaluation at the program, project and policy levels; supported institutional culture and partnerships; maintained resources and improved their efficient use.

Along the same lines, **the second National Development Strategy (2018-2022) (NDS-2)** aims at sustaining economic prosperity through economic infrastructure development, economic diversification and private sector development, and management of natural resources; promoting human development through a comprehensive and integrated healthcare system, quality education and training, efficient and committed workforce; and a sound social development through social protection, public security and safety, cultural enrichment and sports excellence. It also seeks to achieve a sustainable development that preserves the environment.

The NDS-2 includes a new chapter on international cooperation (Global Partnerships for Development) aimed at strengthening Qatar's regional and international roles and status, upgrading international partnerships and contributing actively to regional and international peace and security.

The NDS-2 also contains a new chapter on Performance Management which provides a compass for monitoring implementation paths, ensuring a smooth and efficient follow-up, and facilitating the detection and timely elimination of obstacles. This effort has benefitted from the lessons learned from NDS-1 and the need to focus on results and outputs by monitoring key performance indicators (KPIs) in order to examine their proper implementation, monitoring expected and emerging challenges and constraints, proposing appropriate solutions and remedies, and reporting regularly to the Council of

Ministers to systematically follow-up on performance without taking much of the implementers' efforts in preparing routine reports with no important content. The Ministry of Development Planning and Statistics (MDPS) is building an integrated monitoring system to systematically follow-up and review the NDS-2 performance in order to ascertain its results and objectives; measure its performance and indicators in collaboration with ministries, government agencies, the private sector and the civil society; and accelerate necessary interventions, where appropriate, to overcome implementation obstacles that cannot be overcome by individual agencies or by MDPS. HH the Emir clearly and transparently referred to this major issue:

“If we invest heavily without getting appropriate outcomes, we should not let this pass unnoticeable, because this would mean harm to us. Is it possible that we do not achieve results if we invest all necessary resources? Yes, but only if there is poor planning or mismanagement, namely, poor performance with incorrect reporting and other issues that cannot be covered and need to be addressed immediately. Otherwise, we will be spoiling the community and institutions by spending too much money to no avail.”

Here, the following NDS-2 success factors must be emphasized:

- Efficient use of natural resources, including oil, energy and water.
- Continual upgrading of legislation to keep abreast of various developments.
- Maximizing real private public partnerships (PPP).
- Focusing on improving the capacities of skilled labour in the Qatari labour market.
- Financial sustainability, continued rationalization of expenditure and increased efficiency of spending and revenues to finance development programs and projects.
- Improving coordination and communication among all development partners;
- Building planning capacity and upgrading performance and delivery by improving human and institutional capacities; building the capacity of planning and quality departments nationwide to improve results and outputs and reduce loss of efforts, resources and time.
- Optimal response to the current sanctions against Qatar and turning this challenge into an opportunity for steadfastness, and a catalyst for building and maximizing the values of work and achievement.

In conclusion, I would like to thank all those who have contributed to completing the NDS-2, led by HH Sheikh Tamim bin Hamad Al Thani, Emir of the State of Qatar, who has provided the major orientations for the Strategy. In particular, I would like to thank His Excellency the Prime Minister for his strong support to this process, the distinguished Council of Ministers, heads and members of the Supervisory and consultative groups, sectoral and thematic task teams, experts, MDPS directors, technicians and assistants who have made valuable effort to accomplish this work. We hope that all our efforts will continue to achieve the NDS-2 targets.

Dr. Saleh bin Mohamed Al Nabit
Minister of Development Planning and Statistics

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Qatar Second National Development Strategy 2018-2022 Sectoral Reports

Sectoral reports	Agency
Economic Infrastructure Development	Ministry of Municipality and Environment
Economic Diversification and Private Sector Development	Ministry of Economy And Commerce
Natural Resource Management	Ministry of Municipality and Environment
Comprehensive and Integrated Healthcare System	Ministry of Public Health
Education and Training Quality	Ministry of Education And Higher Education
Social Protection	Ministry of Administrative Development, Labor and Social Affairs
Security and Public Safety	Ministry of Interior
Cultural Enrichment and Sports Excellence	Ministry of Culture and Sport
Global Partnerships for Development (International Cooperation)	Ministry of Foreign Affairs
Sustainable Development to Preserve the Environment	Ministry of Municipality and Environment
Thematic Reports	Agency
Institutional Development, Service Delivery and Fiscal Management	Ministry of Development Planning and Statistics
Population, Labor and Sustainable Development	Ministry of Development Planning and Statistics

Abbreviations

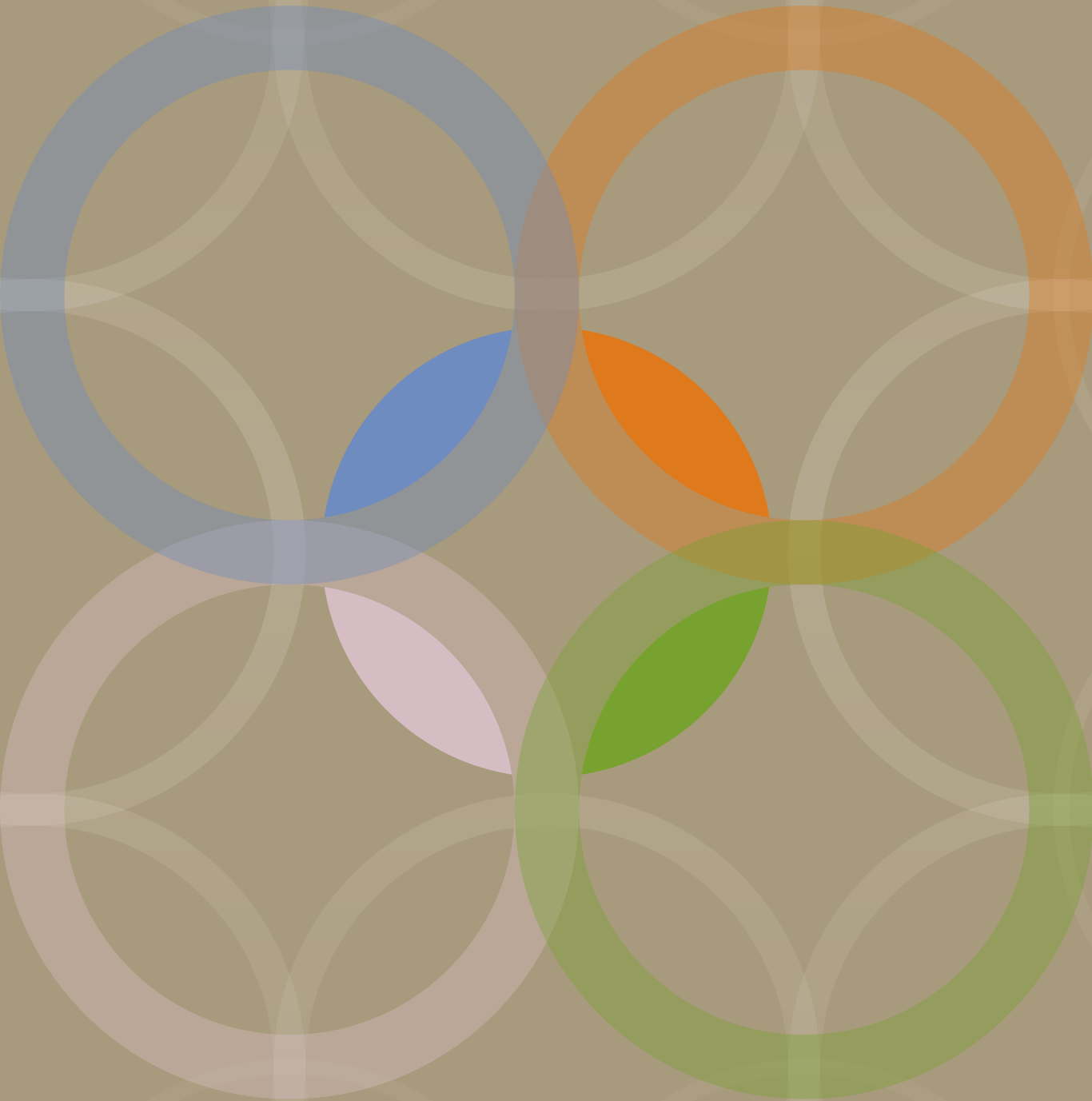
ADLSA	Ministry of Administrative Development, Labor and Social Affairs
Ashghal	Public Works Authority
CNUDP	Comprehensive National Urban Development Plan
CSOs	Civil Society Organizations
CSS	Cultural Sector Strategy
CSSS	Culture and Sports Sector Strategy
EDPSD	Economic Diversification and Private Sector Development
EIS	Economic Infrastructure Sector
ESSE	Electronic Security Shield System
EZC	Economic Zones Company
FCC	Family Consulting Center
FDI	Foreign Direct Investment
GAC	General Authority of Customs
GCC	Gulf Cooperation Council
GDP	Gross Domestic Product
GNI	Gross National Income
GRSIA	General Retirement and Social Insurance Authority
HIA	Hamad International Airport
ICS	International Cooperation Strategy
ICT	Information and Communication Technology
Kahramaa	Qatar General Electricity and Water Corporation
KPI	Key Performance Indicator
LDCs	Least Developed Countries
LICs	Low-Income Countries
MDPS	Ministry of Development Planning and Statistics
M&E	Monitoring and Evaluation
MEC	Ministry of Economy and Commerce
MENA	Middle East and North Africa
MME	Ministry of Municipality and Environment
MEHE	Ministry of Education and Higher Education
MoCS	Ministry of Culture and Sports
MoEI	Ministry of Energy and Industry
MoF	Ministry of Finance
MoFA	Ministry of Foreign Affairs
Mol	Ministry of Interior

MoPH	Ministry of Public Health
MoTC	Ministry of Transport and Communications
MTR	Mid-Term Review
Mwani	Qatar Ports Management Company
NBSS	National Building Safety Strategy
NDS	National Development Strategy
NDS-1	First National Development Strategy (2011-2016)
NDS-2	Second National Development Strategy (2018-2022)
NOG	Non-Oil-and-Gas
NRM	Natural Resource Management
NRW	Non-Revenue Water
NTGS	Non-Tradable Goods and Services
ODA	Official Development Assistance
OECD	Organization for Economic Cooperation and Development
PMS	Performance Management System
PPP	Public-Private Partnership
PWDs	Persons with Disabilities
QCB	Qatar Central Bank
QDB	Qatar Development Bank
QF	Qatar Foundation for Education, Science and Community Development
QFC	Qatar Financial Centre
QFSW	Qatar Foundation for Social Work
QMA	Qatar Museums Authority
QNCECS	Qatar National Commission for Education, Culture and Science
QNV 2030	Qatar National Vision 2030
QOC	Qatar Olympic Committee
QP	Qatar Petroleum
QTA	Qatar Tourism Authority
SDGs	Sustainable Development Goals
SME	Small and Medium Enterprises
SPS	Social Protection Strategy
SPSSS	Security and Public Safety Sector Strategy
SSS	Sports Sector Strategy
TSE	Treated Sewage Effluent
UN	United Nations
WB	World Bank

Part I: Towards the Year 2022



Chapter I: Achievements, Lessons Learned and Continued Support for the Implementation of QNV 2030



1. QNV 2030: A working manual supported by the directives of the state leadership

“To complete our reform and modernization journey, we set in 2008 the country’s future roadmap under QNV 2030, which aims to transform Qatar by 2030 into an advanced country capable of sustaining its own development and ensuring continued decent life for its people ... The Vision provides a framework for the development of comprehensive national strategies and implementation plans, while underlining the balance between the achievements of economic growth and the country’s human and natural resources.”¹

Transforming Qatar into an advanced country by 2030, capable of sustaining its own development and providing for a high standard of living for all of its people for generations to come, is the central aim of Qatar National Vision 2030 (QNV 2030), which was launched in 2008 by then Emir, HH Sheikh Hamad Bin Khalifa Al Thani. QNV 2030 sets out a comprehensive development agenda for the creation of a prosperous and harmonious society.

QNV 2030 articulates core national values to guide development choices, anchored in Qatar’s permanent constitution, the principles of sustainability and inter-generational equity. It establishes a substantive framework for achieving sustainable development by meeting the needs of the current generation without compromising those of future generations. It underlines core issues including the critical importance of sustainable development and its mainstreaming so as to harmonize between economic growth, social and human development and environmental protection. With sustainability as the core principle, QNV 2030 calls for a multi-pillar and multi-sector approach to development that recognizes the cross-cutting dimensions of each sector.

Sustainable national development has been an important focus in the speeches of HH the Father Emir Hamad Bin Khalifa Al-Thani since 1999.² This focus has been rooted in the speeches of HH Sheikh Tamim Bin Hamad Al-Thani since taking over the country leadership in 2013. HH summarized his perspective of the leadership for comprehensive development:

“We can summarize the development goals including QNV 2030 in three words: Building the homeland and citizen. From these, the major tasks of the country’s leadership can be derived. We consider the establishment of institutions based on the rational management of resources, professional standards, productivity and efficiency measurements and serving the public interest on one hand and caring about the citizens’ welfare, qualifying them for productive and useful jobs, and educating them to find a meaning for their lives in serving the country and society on the other hand, constitute the two faces of the development we aspire for ... Comprehensive development has been and continues to be our primary concern. We believe that integrated and balanced development is the way toward establishing a modern state that responds to global realities and ensures that Qatar has the leading position we aspire to, and the Qatari people have a decent life without compromising our Qatari and Arabic origin and Islamic faith.”³

With the rapid economic and social development gains that have taken place as a result of the wise leadership of the State of Qatar as well as the availability and sound management of resources, the aspirations and expectations of Qatar’s people are rising. QNV 2030 frames Qatar’s development aspirations against the background of the critical challenges

1 HH Sheikh Tamim bin Hamad Al-Thani in his speech at the opening of the 42nd session of the Shura Council on 05 November 2013.

2 General Secretariat for Development Planning: “Development and Institutional Reform Directives in HH the Emir Speeches 1999-2012”: March 2013.

3 . See note 1 above.

that need to be overcome to realize them.⁴ Now, almost a decade later, some of these challenges remain relevant, as will be explained later.

The United Nations Conference on Sustainable Development in 2012 (Rio + 20) and the United Nations General Assembly Agreement of September 2015 on a new global development agenda that focuses on an ambitious set of sustainable development goals, have both enhanced the world leaders' attention to sustainability as the only successful way towards our future and the future of our generations. Qatar has always stressed in international forums its commitment toward sustainable development as embodied in QNV 2030.

Sustainable development is the development that meets the needs of the current generation without compromising those of future generations. It reflects the collective aspirations of the peoples of the world towards peace, freedom, better living conditions and healthy environment. Qatar's approach to planning aligns the growth of national prosperity with the realities of sustainable development. Development is achieved with responsibility and respect through balancing the needs of economic growth and social development with the requirements of environmental protection.

Qatar is fully aware that rising sea level and increasing temperatures in coastal areas of the Arabian Gulf will eventually impact the country's urban landscape, infrastructure and marine environment. Adapting to, and mitigating the impact of climate change has become imperative for, and central to, the national sustainable development policy. Qatar's efforts in the field of climate change are not limited to the local environment; they extend to solidarity and joint action as a global responsibility in the fight against hunger and poverty.

Qatar is committed to advancing the well-being of its population and has made tremendous progress in improving human development – moving from 57th in 1997, to 33rd rank globally and first in the Arab world in 2016 according to UNDP's Human Development Index⁵. Maintaining progress necessitates continued social sector investments, particularly in young people. Overall success in achieving social well-being cannot be measured only through the use of traditional measures. Based on subjective measures of well-being, the MDPS Household Survey 2012-2013 reflected an overall satisfaction with the living conditions in Qatar. 84% of persons living in households expressed that they are either very or somewhat satisfied with their lives.⁶

First Qatar National Development Strategy 2011-2016: Important learning path and first step on the comprehensive planning for development and sustainability:

HH Sheikh Tamim bin Hamad Al Thani clearly summarized what the First Qatar National Development Strategy 2011-2016 (NDS-1) meant for present and future generations as a tool to fulfill QNV 2030:

“The QNV 2030 aims at transforming Qatar into an advanced country, capable of achieving sustainable development and ensuring the continuation of decent living standards for its people, generation after generation, by seeking to develop a diversified economy coupled with diminishing dependence on hydrocarbons, where investment is moving towards a knowledge-based economy and the private sector is growing in importance.”

⁴ Qatar National Vision 2030 Booklet, page 3.

⁵ Human Development Report 2016: http://hdr.undp.org/sites/default/files/HDR2016_AR_Overview_Web.pdf.

⁶ <http://www.mdps.gov.qa/en/Miscellaneous/Old/LivingConditionsReport-2012-2013-Ar.pdf>

The NDS-1 crystallized the development priorities, which include sustaining economic prosperity, upgrading infrastructure, raising natural resource management efficiency, diversifying the national economy, activating the role of the private sector and promoting human development especially in the fields of education, health and environmental protection.”⁷

The NDS-1 focused on a range of development issues and priorities. On top of these priorities were those related to human development as the center and tool of development and the primary concern of the leadership of the state:

“We are still facing the development challenge, first and foremost, human development which is our most important asset and this is related to investment in education, health and infrastructure against which our success in this task is measured.”⁸

The NDS-1 established a health system that provides high-quality services while re-balancing the health system to rely primarily on primary health care. Now, primary health care has become the leader in the country’s health work, which eased pressure on hospitals providing advanced healthcare. Focus was also on building a quality world-class education system which gradually expands to include pre-school level (age 0-6 years). Emphasis was placed on enhancing citizen’s participation in the labor market and on adjusting its structural imbalances, as well as on strengthening family unity and supporting its role as the cornerstone of the community fabric.

On the other hand, remarkable progress has been made in culture and sports by building cultural infrastructure and motivating the cultural movement with a focus on strengthening national identity and highlighting the components of local culture. The opportunity to organize the 2022 World Cup also provided exceptional circumstances to make sport a public activity. In February of each year, Qatar celebrates the Sports Day which features various types of sports, especially walking, where spacious, well-maintained green landscape offers the opportunity for everyone to practice their favorite sports. The State attaches great importance to this vital sector, and HH the Emir considers it an integral part of the country’s investments in development:

“We will continue to focus on the national economy, develop services, build public facilities and promote the youth and sports sector. We will also take care of our investments for future generations and diversify the country’s sources of income.”⁹

The NDS-1 adopted the QNV2030 aspirations. It set out outcomes and proposed targets, programs and projects aimed at creating suitable conditions for a sustainable and harmonious future. It also highlighted the need to invest in institutions, policies, systems and people to enable the State to manage the development process in a forward-looking approach that balances the interests of present and future generations. Focusing on the QNV 2030 four pillars (Figure 1.1.2), the NDS-1 was the first attempt to focus uniformly on nationwide development planning to improve the citizens’ life through a number of comprehensive and ambitious programs. However, not all NDS-1 initiatives have been implemented, and in some cases the results did not meet expectations. The NDS-1 focused on institutional modernization and development as the most important enabler for public agencies’ efficiency and ability to implement national development programs and projects in all sectors. Chapter 7 was devoted to institutional modernization and development, while Chapter 8 described the process of transition from theory to practice, indicating the need to introduce action plans that integrate all initiatives and activities into a single framework with specific outcomes. It also underlined financial sustainability as a basis for the optimal use of resources and as part of the institutional development initiatives through

7 HH Sheikh Tamim bin Hamad Al-Thani in his speech at the opening of the 44th session of the Shura Council on 3 November 2015.

8 HH Sheikh Tamim bin Hamad Al-Thani in his speech at the opening of the 42nd session of the Shura Council on 05 November 2013.

9 Ibid.

the elaboration of a medium-term financial framework, guiding the economy through a stable path, raising the efficiency of the country's investments and meeting the development needs, while emphasizing the efficiency of natural resource management, environmental sustainability, increased awareness of the need for organizational alignment in government agencies, better government performance, the private sector development, wider economic diversification and higher productivity of the non-hydrocarbon sector, high-quality physical and IT infrastructure, and high-quality and efficient public services.

As part of Qatar's planning framework, a Mid-term Review of the NDS-1 was conducted in late 2013 (NDS-1 Mid-term Review) to re-adapt its programs and projects in light of the lessons learned (Fig 1.1.2). Flexibility in considering the lessons learned and making necessary amendments when needed are two key factors in any planning system. Qatar's development planning cycle thus allows for mid-term changes to ensure the continuing relevance and practicality of its 6-year strategies at the sector and national levels.

2. Lessons learned: NDS-1 achievements and failures

The NDS-1 had a positive impact in laying the foundations of the culture and importance of integrated strategic planning aligned with QNV 2030; encouraging a sector-wide and cross-sector focus on issues that are interrelated; continued dialogue and communications with key stakeholders; program and project management, enterprise-wide planning, outcomes-based management and monitoring performance.. This led to many implementation initiatives across all sectors that demonstrated progress and momentum towards the achievement of agreed development targets. The mid-term review and subsequent monitoring by the Ministry of Development Planning and Statistics (MDPS) revealed that NDS-1 realized numerous achievements, though below expectations. It created a common culture of development planning adopted by all government departments based on achieving NDS outcomes and related targets.¹⁰ It also led to recognizing that planning requires collective and innovative thinking outside the silo, sector-wide and across sectors coordination as well as synergy between central authorities and public service providers. Thus, it legitimized the national planning framework, which provided a common superstructure and helped establish a result-oriented culture of development planning and program and project management that ultimately lead to the achievement of QNV 2030 major goals. The NDS-1 built human resource capacity, and technical expertise in project management and implementation - though still insufficient for development requirements. It raised awareness of the critical importance of monitoring, follow-up and evaluation at program, project and policy levels, which in turn creates new demands on capacities, information and data. It stimulated several reform efforts, including in fiscal management reform, and highlighted some key issues requiring action, including subsidies. Furthermore,, the NDS-1 encouraged policy and institutional innovations, including drawing up a roadmap for budget modernization; a comprehensive national health policy; a public investment management process; a food security program; public-private partnerships; justification for reforming subsidies and resource conservation; and water management strategy and policy and water loss prevention. It also motivated project interventions, including emission reduction; water network loss; school infrastructure and reform; IT systems, including e-government; road safety; sports facilities and participation. The NDS-1 provided a sound planning platform that the State can rely on in the future as well as a framework to organize and integrate all collective efforts toward realizing the national development goals in line with QNV 2030. It provided an integrated view on national development across different sectors. It also stimulated the national discourse on development options and established a nationwide consultation process. It defined the core values guiding development options that are rooted in Qatar's Constitution and are based on the principles of sustainability and intergenerational equity. It developed a framework for the development transformation agenda toward a prosperous and harmonious society. The NDS-1 also inspired a series of positive changes and strengthened the participation of governmental and non-governmental organizations in development efforts. It established a common planning infrastructure at the sectoral and institutional level. It supported cooperation with international actors including the World Bank and the United Nations.

¹⁰ In his speech at the opening of the 45th session of the Shura Council on November 01, 2016, HH the Emir called for a "culture of planning, action and achievement" to be a vital requirement for the success of strategies and plans.

While the NDS-1 was a first learning milestone in Qatar's journey towards development planning, the NDS-2 should consider the changing conditions and leverage the lessons learned to develop solutions for the current and future challenges. On top of these solutions is to unify efforts to achieve national consensus, support short-term and mid-term planning capacities at government agencies, implement a result-oriented planning approach and accumulate expertise, while focusing on the central government functions. To overcome the limitation of sector-level methodology in certain sectors and poor stakeholder participation, efforts were joined to adopt agreed upon work programs between ministries and agencies within each sector, including support to private sector and civil society in leading some initiatives. There is still a need to strengthen the ownership and design of programs and projects, through emphasizing that interventions and initiatives proposals are received from those who will own and implement them. The competent authorities will develop the details of their respective projects when preparing the implementation plans and annual output plans. Promoting partnership with the private sector will continue to be important to ensure QNV is achieved, particularly in high-cost and long-term return projects. It is also imperative to remove the obstacles facing SMEs, to continue to develop an attractive investment climate, to direct the private sector towards knowledge-based projects and to build national entrepreneurs.

Government restructuring and its impact on NDS implementation

Following the launch of NDS-1 in 2011, a new government situation emerged in the country. Within the institutional modernization process, distribution of ministries and other government agencies was reviewed and their functions were reallocated. With HH Sheikh Tamim taking office in June 2013, the first two restructurings of ministries were carried out. The Council of Ministers (CoM) was restructured by Emiri Order No. 4/2013 (amended by Emiri Order No. 1/2016). In implementation of this Emiri Order, Emiri Decision No. 16/2014 was issued to re-designate the concerned ministries forming the CoM. Accordingly, many public bodies became under ministerial supervision.

Within the ministries first restructuring process, the Ministry of Development Planning and Statistics (MDPS) was created by Emiri Decision No. 16/2014 and its administrative units were structured by Emiri Decision No. 28/2014. Under these two Decisions, the General Secretariat for Development Planning, which had coordinated the NDS-1 development, was merged with Qatar Statistics Authority (QSA), after adjusting the latter's functions. MDPS, thus, was tasked with coordinating the national planning cycle and following up on the national development strategy.

In January and February 2016, pursuant to Emiri Decision No. 1/2016 and Emiri Decree No. 4/2016, a number of ministries and government agencies were merged and their mandates and structures were changed. The Supreme Council of Education and the Supreme Council of Health were also restructured into new ministries.

The country leadership, represented by HH the Emir, is highly aware of the critical importance of institutional modernization and development to keep pace with development requirements. The leadership continued to review government structures from time to time in order to improve performance by clearly specifying responsibilities and tasks and preventing conflicts of competencies:

“We will announce, in due course, plans to restructure the ministries to reduce duplication and make all public responsibilities under clearly specified ministries; a project we started last year under the rule of the Father Emir and we will continue to work on and implement.”¹¹

In 2016, HH the Emir reaffirmed the continuity of the process of “developing and modernizing public sector institutions with a view to reaching an efficient, transparent and accountable public sector.”¹²

11 HH Sheikh Tamim bin Hamad Al-Thani in his speech at the opening of the 42nd session of the Shura Council on 05 November 2013.

12 HH Sheikh Tamim bin Hamad Al-Thani in his speech at the opening of the 45th session of the Shura Council on 1 November 2016.

Table (1.1.1): Summary of key lessons learned and proposed solutions for the period 2018-2022

Lessons learned from NDS-1	NDS-2 Responses	Desired impact
Too many targets with unclear prioritization	Greater focus and clearer priorities	Achievement of targets
Lack of clear financing mechanism	Stronger links with national budget allocation, and strict planning at the institutional level	Allocation of required resources
Institutional reforms in the projects are often limited	Reforms with tangible and clear positive impacts and initial policies that ensure their success	Better design of reforms
Disparity in level of commitment to targets	Incorporating ownership into institutional plans with improved monitoring and reporting mechanisms	Stakeholder ownership promotion
Poor coordination at the level of most sectoral and cross-sector programs	Supporting and updating the central government role, with a clear and comprehensive coordination mechanism among various sectors and entities involved in the NDS	Enhanced coordination
Poor policies, planning and implementation capabilities at the institutional level	Ensuring that public administration is modernized and prioritized	Capacity building and capability enhancement
Lack of integrated monitoring, follow-up and reporting system	A full chapter has been devoted to NDS follow-up. With the World Bank assistance, an integrated performance monitoring, follow-up and reporting system was designed	Enhanced ownership and effective implementation of NDS programs and projects and better achievement of their objectives

However, the effective NDS implementation will continue to be subject to modernizing and improving the performance of the public sector. Therefore, completing efforts in this regard is crucial, particularly the implementing government agencies transition from awareness of planning as a tool for outcomes achievement to systematic institutional practices in the development of executive plans, medium-term strategies and annual output plans. The implementing government agencies should also move from identifying the projects required to achieve development outcomes to designing and managing the projects required to achieve and evaluate priority outcomes ; from dealing with NDS projects as parallel to their work and functions, to fully incorporating and integrating them into their institutional plans; and from coordination at the institutional level only to coordination at the sectoral level as a whole; in addition to completing efforts related to strengthening the linkage between strategic plans and the funding resources required for implementation.

3. Development challenges

First: Challenges at the QNV pillars level

Modernization while preserving traditions comes on top of these challenges. The ever-increasing inflows of culturally and linguistically diverse expatriate workers and their dependents may potentially affect traditional Qatari and Islamic cultural values and identity. Moreover, meeting the needs of the current generation while preserving the fortunes and rights of future generations is an

indispensable goal. The large gap between government spending and non-oil revenues may realize welfare for the current generations, but could threaten inter-generational equity by taxing future generations should oil and gas revenues continue to decline while government spending continues to increase. The QNV reflects another big challenge: targeted growth and uncontrolled expansion. Like other hydrocarbon producers, Qatar remains vulnerable to hydrocarbon price declines, and pro-cyclical fiscal government spending behaviour has tended to accentuate volatility. The size and quality of the expatriate labor force and the targeted path of development continue to be a major challenge as identified and alerted in the QNV. The rapid growth and low skill intensity of Qatar's labour force are inconsistent with enhancing labour productivity and the development of a knowledge-based economy. Meanwhile, the QNV highlighted the need to continue balancing between economic and social development and environment protection and development, to prevent further environmental degradation as a result of completing the economic and social infrastructures.

Second: Institutional challenges

Implementing the NDS in a way that fulfills the country's aspirations is facing various institutional challenges, the foremost of which is the need for continued support by the Council of Ministers and the country's wise leadership, and their implementation directives, if necessary. NDS implementation requires efficiency of performance, capabilities of institutions and individuals and the cooperation and integration among various stakeholders. Completing the regulatory framework for integrated urban development and spatial planning (urban plan and transport plan) will significantly help in the efficient implementation of NDS programs and projects and achievement of their targets.

Poor sectoral coordination and integration is another major institutional challenge. Almost all sectors consider poor coordination as a big barrier to implementation progress. This challenge reflects the lack of clarity in the overall sectoral orientation of some government sectors, such as transport and infrastructure sectors, agricultural production sector, and fishery and livestock production and food security sector, resulting in a slowed implementation of certain programs and projects. Poor coordination is due to the lack of "planning culture" and "team work" that requires joint action and coordination of efforts. HH the Emir highlighted the need to overcome this challenge. After stating 10 major themes to be the focus of NDS-2, HH concluded:

“Implementing these elements requires the development of a culture of planning, action and achievement. Securing the necessary funds for implementation requires a change in the culture of consumption and in dealing with wealth, as well as an approach that combines between the expectations of both the State and the citizen belonging to this society and this country.”¹³

It should be noted that some priorities in government spending and investment have changed from the initial plans. The focus of NDS-1 had a slight track change due to re-channeling investments toward other national obligations after the significant drop in the country's revenues.

Third: Economic and new development challenges

While the returns from Qatar's abundant hydrocarbon resources have provided the means to invest in world-class infrastructure; build efficient public service delivery mechanisms, especially health, education and social protection; create a highly skilled labour force; support the development of entrepreneurship and innovation capabilities; and provide a means to invest in new technologies and frontier scientific research and development, the collapse in hydrocarbon prices since mid-2014 has put Qatar's state budget under considerable strain. Thus, high levels of public spending will be challenging to sustain in the future if oil and gas prices remain low, as is probable with the increased supply of alternative energy sources at lower production costs. Low hydrocarbon prices will impact the social expenditures and will call into question some of the generous

¹³ HH Sheikh Tamim bin Hamad Al-Thani in his speech at the opening of the 45th session of the Shura Council on 1 November 2016.

social welfare programs and subsidies that benefit citizens, since the impact on fiscal balances is remarkable, especially that nominal GDP is declining and real GDP is growing less than in the past.

Furthermore, the new issues that the state faced prior to NDS approval made it urgent to work hard to achieve the NDS targets and all drawn up development targets. Addressing the Council of Ministers at its ordinary meeting on Wednesday 2/8/2017, HH the Emir highlighted the importance of the coming period and moving forward to achieve the QNV 2030 and major development projects at the same original pace and with optimal quality as always expected for Qatar projects. He also stressed the importance of self-reliance, whether in national security, economy or food and medicine.

In his address to Qatar's citizens and residents on 21/7/2017, HH also stressed the importance of investing in positive work spirit, of solidarity and motivation to give and achieve, to become the approach and measure of future work in Qatar, and to promote and encourage the continued teamwork and cooperation among all citizens and residents and make this the feature of the coming stage. HH described the coming period as "highly important in terms of the opportunities it avails, not only for construction but also for bridging gaps and correcting mistakes."

HH highlighted the priority of focusing on internal efforts by strengthening the internal economic, security, health and educational fronts.

In the fields of economy, investment and income diversification, HH called for quickly completing studying the remaining legislations and implementing them. He also highlighted spending rationalization without affecting the country's major development projects and their quality.

The NDS-2 addresses the sustainability of improvements in the standards of living through increased economic diversification and private sector development, with greater efficiency in government spending and improving the selection of new programs and projects. While oil and gas investment revenues will continue to form a strong foundation for Qatar's long-term sustainable development Vision, the boundary between the State's role as a service provider and its role as an investor needs to be redrawn. This rebalancing will also need to weigh citizens' entitlements, responsibilities and accountabilities.

4. NDS-2 development - framework and methodology

Qatar's National Planning Framework and Major Priorities

The NDS-2 outlines a national roadmap for the period 2018-2022 at the strategic level. It deploys efforts to guide activities and resources towards determined national priorities during this period as agreed among the development partners¹⁴. These plans depend on the human resources who ensure their careful and professional design and efficient implementation in light of the available data, especially the State budget. Thus, the implementation plans/ annual outputs should include cost estimates of all their respective development programs and projects. Efforts should also be made to align these plans with the directives of the Ministry of Finance to ensure adequate funding and best possible efficiency of government spending during each fiscal year and throughout the NDS-2 period. The NDS-2 performance will be managed through a system that has been designed and approved to evaluate and review progress in achieving its targets¹⁵. This strategy is flexible enough to respond to emerging events and new development needs.

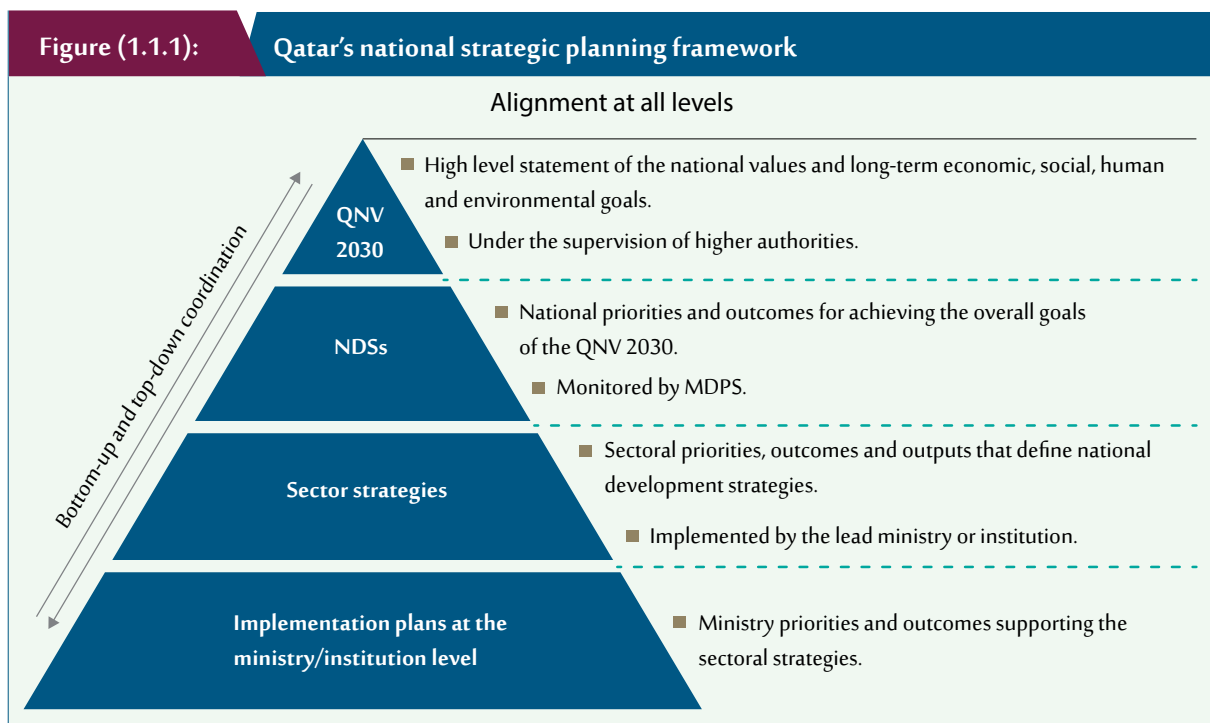
¹⁴ Represented in the task teams, Supervisory Group, Consultative Group and whose feedback is reflected in the CoM notes and the subsequent ministries' notes submitted after the NDS drafting in light of the CoM guidance.

¹⁵ Part VII: NDS-2 performance management

The NDS has formed the basis of a national framework for comprehensive and coherent planning (top-down and bottom-up) (Figure 1.1.1). The framework consists of fourteen sector strategies; each formulated according to the general and detailed objectives of QNV 2030. These sector strategies provide more detailed information on each program, including the activities to be implemented, risk and mitigation measures, estimated resource requirements and a monitoring framework. HH the Emir pointed out to that:

“Plans are developed not only to complete a procedure in a formal manner, but to be implemented. Thus, they should be designed carefully and diligently, and be achievable within the data framework, including the available budgets. Our institutions should respect the laid plans and exercise accountability based on these plans and their objectives”¹⁶.

The NDS-1 identified the priority structural programs, projects and initiatives that emerged from the fourteen sector strategies, with related quantitative and qualitative targets, to overcome various challenges confronting the nation, and set it on track to achieve the QNV 2030 development goals. The NDS-1 was an initial plan of action, one of the main goals of which was to build human and institutional capacities necessary for Qatar to become a more sustainable, prosperous and cohesive society to achieve this vision. It focused on linking the development priorities to QNV as the top of the planning pyramid.



Source: First Qatar National Development Strategy 2011-2016

QNV 2030 major goals are distributed into four development pillars: human development, social development, economic development and environmental development, with the modernization of public-sector institutions as a critical cross-cutting enabler (Figure 1.1.2). It was thus recognized that successfully implementing the NDS-1 programs was contingent upon modernizing the public institutions. The NDS-1 targets, a set derived from the targets of the sector strategies, focused on the outcomes expected to be achieved by 2016. In preparing these strategies a common planning framework was provided based on official population projections and economic forecasts.

¹⁶ HH Sheikh Tamim bin Hamad Al-Thani in his speech at the opening of the 43rd session of the Shura Council on 11 November 2014.

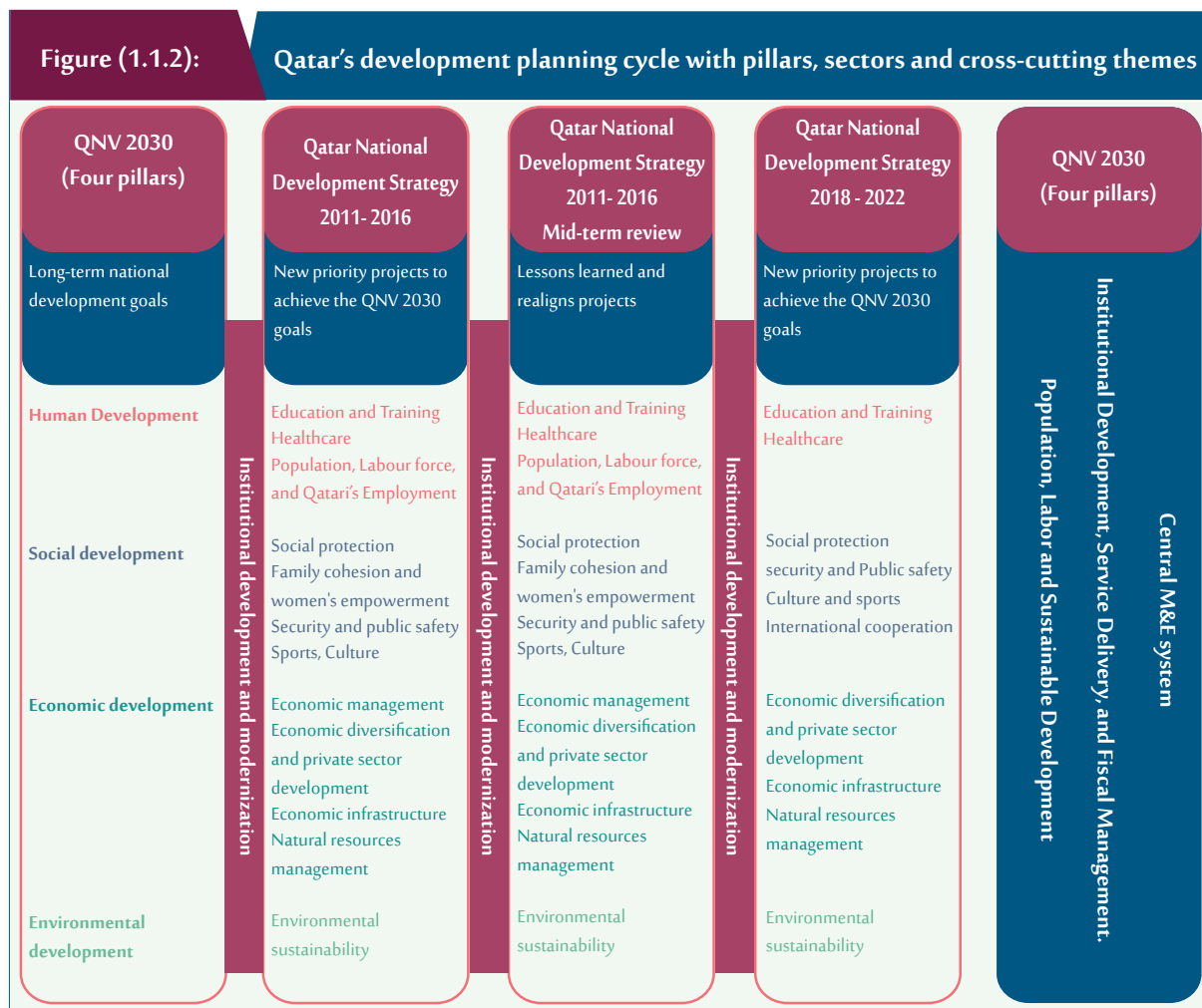
A rationalized government structure was fully taken into account while designing and preparing the NDS-2. Its preparation was influenced by the new circumstances in government structure and economic developments. The number of sectors was reduced from 14 in the NDS-1 to 8 in the NDS-2 and they were organized according to the four QNV pillars. These eight sectors included international cooperation sector, which was created based on the QNV 2030 guidelines. The Ministry of Foreign Affairs led the development of the international cooperation sector report and will lead the implementation of the international cooperation strategy. In accordance with QNV, the international cooperation sector will enhance Qatar's regional and international economic, political and cultural roles, particularly in the Gulf Cooperation Council, Arab League, Organization of the Islamic Conference and the UN and its affiliated agencies. It will further intensify and promote cultural exchange with the Arab peoples in particular and other peoples in general, foster and support dialogue among civilizations and coexistence among different religions and cultures and contribute to realizing international peace and security through political initiatives and development and humanitarian aid.

The NDS-2 planning cycle focused on two themes shared by different ministries:

A. Population, labor force and sustainable development;

B. Institutional development, service delivery and fiscal management;

in addition to another common theme, i.e. monitoring and evaluation (see left column of figure 1.1.2) below.



Source: First Qatar National Development Strategy 2011-2016 (amended)

Institutional arrangements for NDS-2 development

In order to ensure national consensus on the results and ensure their achievement, the private sector and other social actors were engaged in the development of NDS-2 (Fig. 1.1.3). The Supervisory Group ensured that relevant stakeholders provided needed reports and data to facilitate the NDS-2 preparation in response to the request of MDPS and the sector Task Teams. It also provided solutions to cross-sector implementation issues and provided feedback to ensure consistency. It reviewed the sector strategy reports of ministries and agencies prepared by Task Teams. It also recommended new and emerging national development priorities and supported their alignment with the NDS-2; reviewed the NDS-2 programs, targets and outcomes; recommended measures to enhance NDS implementation, monitoring and evaluation, especially in inter-sector interfaces and reviewed the final draft of NDS-2 document.

The high-level Non-public Sector Consultative Group was responsible for articulating priority development issues that concerned citizens, civil society and academia and how to include them in the NDS-2. It further advocated programs to be included in NDS-2, such as human development and rights-based perspective, particularly the rights related to the persons with special needs and vulnerable groups, and provided relevant inputs and data to support NDS-2 preparation.

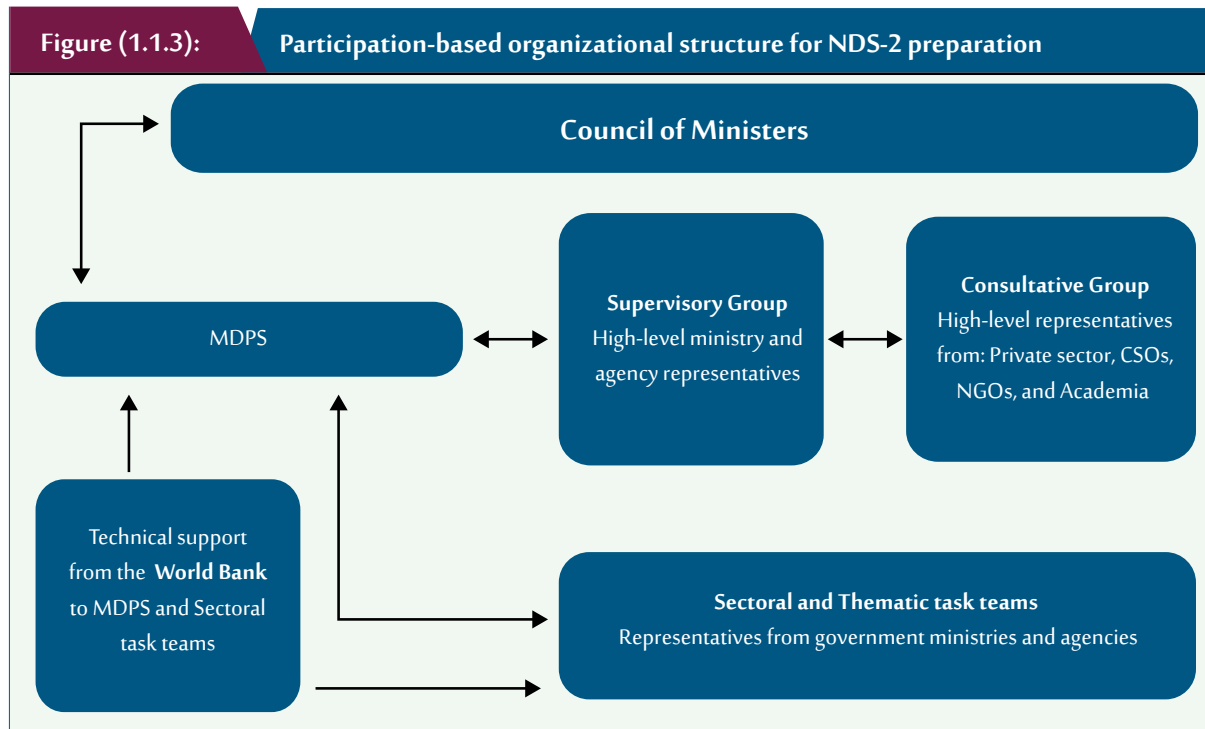
On the other hand, the sector strategies were developed by sectoral ministerial task teams that included representatives from civil society and the private sector. Each Task Team prepared comprehensive evidence-based assessments of particular sectors, in addition to the challenges facing sectors and the programs required for the period 2018-2022 to overcome these challenges. The Task Teams were responsible for ensuring a comprehensive sector-wide engagement and consultative process, including the private sector and civil society; carrying out a situation analysis of the concerned sector and identifying new and emerging national development priorities; coordinating with stakeholders and partners to collect data and information that support an evidence-based situation analysis; defining sector priority programs and outcomes for NDS-2; preparing action plans; agreeing on a high-level indicator framework for monitoring NDS-2 sector outcomes, and drafting sector reports.

MDPS provided the coordination links with the higher authorities and with the high-level working groups and Task Teams. For this purpose, MDPS established a Project Management Office (PMO) to coordinate the NDS-2 preparation arrangements and develop reference templates and frameworks and provide assistance to each of the eight Task Teams. The PMO provided Task Teams with technical support and coordination, including: support for the task team chairs of the in meetings, information reviews and data analysis, in addition to quality assurance of outputs. Each task team prepared comprehensive evidence-based national sector strategies, and the related programs and targets for the period 2018-2022. A key performance indicators framework was developed for central monitoring of programs and targets.

The comprehensive and intensive inter-sectoral consultations, including interviews, discussions, and working papers, played an important role in enhancing stakeholder participation to secure the concept of ownership, instill values of responsibility and advance the implementation process. Moreover, the government benefited from international institutions, such as the World Bank, to support the leveraging of international experiences in the planning and management of sustainable development.

Roles and responsibilities in NDS-2 preparation

As presented in Figure 1.1.3, a structure based on national participation and cooperation and clear roles and responsibilities was adopted. This structure consists of:



Source: Ministry of Development Planning and Statistics

Supervisory Group:

The Supervisory Group consists of the directors of planning and quality in government ministries and has the following mandate:

1. Form sectoral and thematic task teams to contribute to the NDS-2 preparation.
2. Form a consultative group of high-level representatives from the private sector, civil society, NGOs and academia and define its mandate.
3. Instruct ministries and other government agencies to nominate appropriate human resources for the sectoral task teams and provide the necessary data, studies and reports to facilitate the NDS-2 preparation.
4. Review and develop solutions for cross-sectoral issues to ensure alignment.
5. Review the proposals for new and emerging national development priorities in the sectors and support their alignment within the NDS-2, before being submitted to higher authorities.
6. Review and approve MDPS periodic progress reports on the NDS-2 preparation, including obstacles and recommendations for submission to higher authorities.
7. Review the NDS-2 draft and approve its recommendations.

Consultative Group (From outside the government):

The consultative group is assigned with:

1. Supporting the Supervisory Group in determining development priorities and the mechanism for integrating those priorities into the NDS-2.
2. Providing feedback and guidance on the NDS-2 strategic results, programs, projects and targets and propose development issues that should be included in the NDS-2.
3. Proposing development issues that promote public-private partnerships to ensure a greater role for the private sector in

national development plans, which can be incorporated in the NDS-2, and providing advice on the participation of civil society organizations, nonprofit organizations and educational and research institutions in the development process.

Sectoral and Thematic Task Teams (nationwide representation):

These Teams have the following roles and responsibilities:

1. Coordinate with the ministries, government agencies, private sector and civil society on the collection and analysis of data and information and prepare the NDS-2 sector reports.
2. Review issues related to the NDS-1 implementation and submit proposals to improve implementation.
3. Propose new and emerging national development priorities in sectors.
4. Develop an indicator framework to monitor the NDS-2 sector outcomes and related objectives.
5. Prepare the NDS-2 sector and thematic reports.
6. Provide data, information, proposals and reports using the MDPS templates.

Ministry of Development Planning and Statistics:

The MDPS established the NDS Project Management Office (PMO) to develop the NDS-2. Through its PMO and technical departments, MDPS assumed the following tasks:

1. Prepare and hold meetings of the Supervisory Group and the Consultative Group.
2. Prepare regular progress reports on the NDS-2 preparation and the obstacles encountered and propose suitable solutions for the Supervisory Group.
3. Provide technical and administrative support and coordination across all sectors.
4. Communicate with the public with regard to the NDS-2 issues.
5. Guide the consultative process with representatives of the task teams, key stakeholders, private sector and civil society.
6. Review the outputs of the task teams and ensure good quality.
7. Assist in identifying new and emerging national development priorities.
8. Design templates for the NDS-2 sector reports and final report.
9. Develop the NDS-2 final report.

Achieving outcomes and outputs is a success criterion

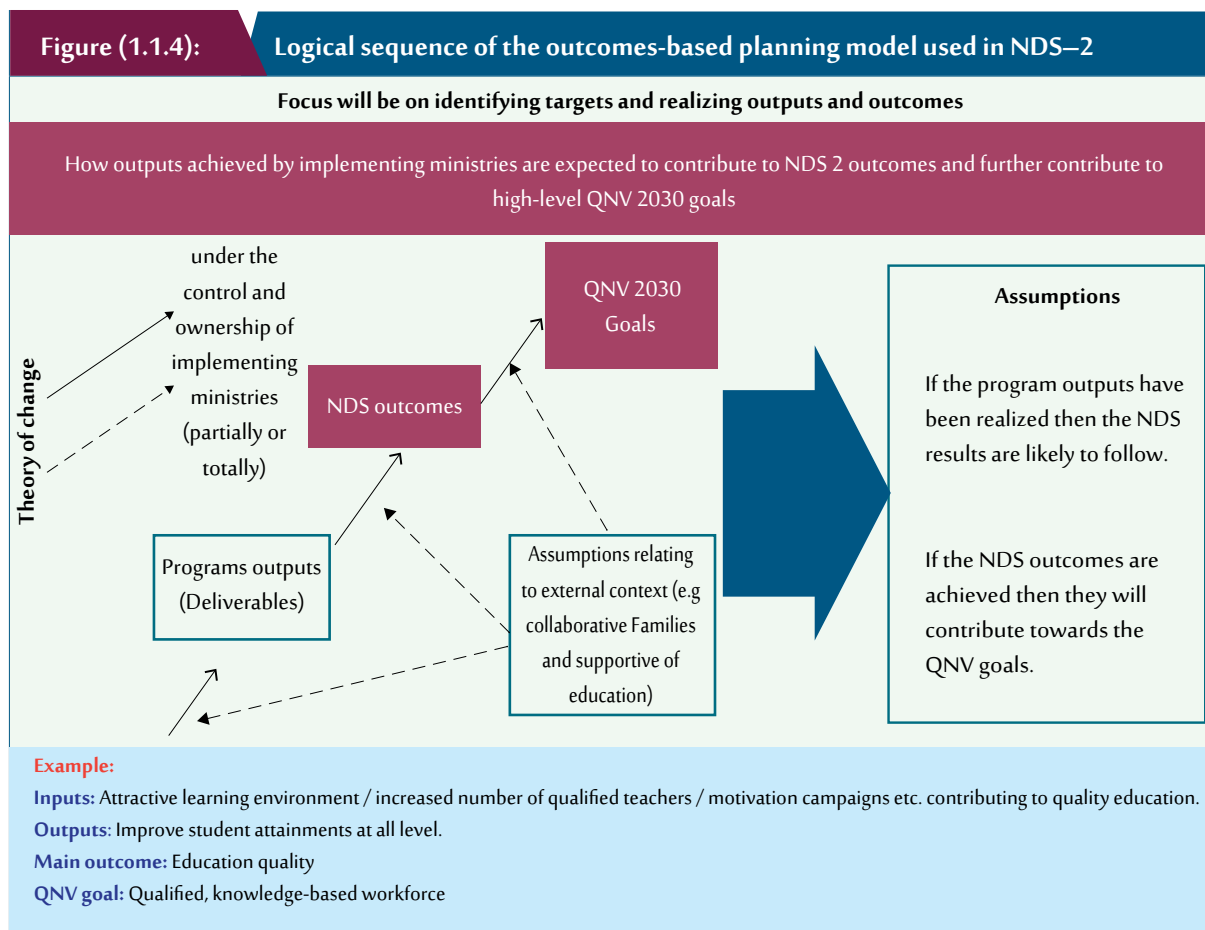
HH the Emir made it clear that success should be measured against outcomes and outputs rather than against used resources or interventions.

“We shall continue to invest in different sectors, but will be stricter and clearer about the results and outputs. We cannot develop the human being without developing health, education, culture and sport, and these cannot be developed without investing effort and money. However, if we invest heavily without getting appropriate outcomes, we should not let this pass unnoticeable, because this would mean harm to us. Is it possible that we do not achieve outcomes if we invest all necessary resources? Yes, but only if there is poor planning or mismanagement, namely, poor performance with incorrect reporting and other issues that cannot be covered and need to be addressed immediately. Otherwise, we will be spoiling the community and institutions by spending too much money to no avail.”¹⁷

¹⁷ Speech of HH the Emir at the opening of the 42nd session of the Shura Council on 5 November 2013.

Qatar's national strategic planning system has used outcomes-based planning as a strategic framework that helps to focus resources towards achieving agreed development outcomes through a series of specific and measurable goals and well-planned projects: Figure (1.1.4). Development targets are achieved once targets are realized and risks are addressed.

The monitoring and evaluation system in program/project design provides an opportunity for progress review. The planning model also helps explain the expected causal links in a series of outcomes for any program, starting from inputs through activities (operations) and outputs to achieving defined targets and outcomes, i.e. the targeted final impact. The NDS-1 approach required, in certain cases, descending to the project/activity level, including the required inputs. While in the NDS-2, focus has been on a higher level, where the details of the inputs and activities for each program were the responsibility of the implementing agency and were addressed within its respective "implementation plan"



Source: Ministry of Development Planning and Statistics

An outcome indicator framework is employed as a means to evaluate and monitor sector progress. Benchmarking indicators were obtained from various sources and the year 2008 was set as a baseline – the year when QNV 2030 was launched. The focus on a limited number of monitorable outcome indicators shows whether progress has, or has not been made in development, even if this progress could not be easily attributed to specific programs.

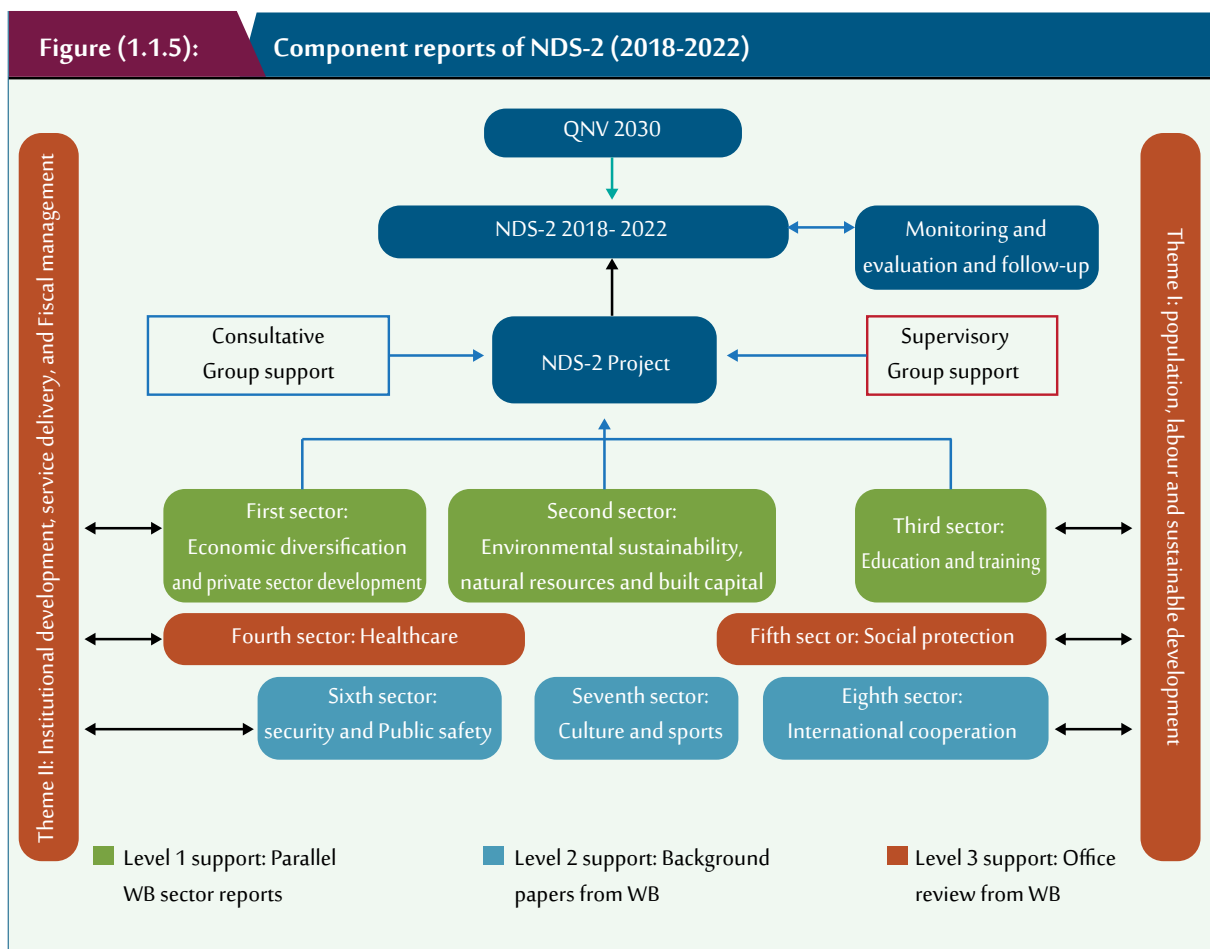
World Bank Support

As part of the NDS-2 preparation process, the World Bank was commissioned by MDPS to provide technical support services. Teams of WB experts, working in parallel with ministerial task teams, undertook independent sector studies, provided

technical inputs to some other sectors and prepared three independent, specialized and comprehensive reviews – the first covering population, labor force and sustainable development; the second covering fiscal management, service delivery and institutional development, and the third was related to a monitoring and evaluation framework. The key recommendations from the various WB reports were taken into account as appropriate by the Task Teams in the preparation of their various reports, and the recommendations from the WB studies were incorporated into an integrative report.

Inputs Forming NDS-2 (2018-2022)

Figure 1.1.5 summarizes the main component reports produced by Qatar’s ministries and agencies, and the World Bank’s integrative report, that MDPS integrated together to form the NDS-2.



Source: Reports forming NDS-2 (2018-2022)

5. NDS-2 response to current and future challenges

The NDS-2 has addressed most of the challenges faced by the NDS-1 (2011-2016) as illustrated in its parts and chapters below. Through a wide participatory process, NDS-2 set out the priority national development agenda for the coming years up to the end of 2022, by validating and re-evaluating national development goals; identifying (old and new) obstacles to change, and re-evaluating priorities. It re-identified actions based on priorities, lessons learned and what can be realistically achieved. It also helped mobilize and align financial and non-financial resources with national development priorities.

NDS-2 has also enhanced integration and cohesion by providing a platform that guides and directs detailed sector and entity planning towards national development goals, and has leveraged partnerships with the private sector and other stakeholders. NDS-2 has further reinforced steps towards improved governance and performance by supporting the continuing government modernization and development programs and projects, enhancing organizational alignment and capacity building and improving the public sector performance. In summary, NDS-2 responds to the national, regional and global challenges in efforts to ensure continued well-being, peace, security, and sustainability of all citizens and people living in Qatar.

Aligning the National Development Strategy (2018-2022) outcomes and targets with the goals of the Sustainable Development Agenda 2030

“In commitment to the Sustainable Development Agenda 2030 adopted by the World Summit on Sustainable Development in September 2015 and to the Global Partnership for Development, the NDS-2 outcomes and targets have been aligned with the goals and targets of the Sustainable Development Agenda according to the sectors linked to this Agenda. Figure 1.1.6 shows the 17 goals of the Sustainable Development Agenda. With this alignment, the goals and targets of the Global Sustainable Development Agenda 2030 have become one of the components of NDS-2. The goals and targets of the Global Sustainable Development Agenda will receive the same attention as those of the national development strategy so that efforts to achieve the targets of the second national development strategy will lead to the achievement of the Sustainable Development Agenda 2030 goals. The implementing agencies will allocate necessary resources to implement NDS-2 goals in accordance with the agreed timeframe, and will provide national and international indicators to measure their implementation progress.”



Source: United Nations General Assembly

Diversifying the Production Base of the Economy

Due to the specificity of the production base of the Qatari economy, where the oil sector still accounts for nearly 49% of the GDP, about 89% of total commodity exports, and around 94% of total State revenues, the first NDS-2 pillar is to diversify the production base through increasing public investment to complete the relevant infrastructure in promising economic sectors, promoting private investment by providing adequate conditions and basic services for of these sectors to grow, establishing industrial and service zones, supporting and developing SMEs and increasing their contribution to the diversification of the production base.

Rapid Population Growth, Labor Force and Sustainable Development: a Cross-cutting Focus

The population continued to grow significantly, rising from 1.8 million in 2012 to more than 2.6 million in 2016.¹⁸ This is expected to continue until 2020, when the number will gradually decrease as many major construction projects will have been completed. Significant population growth affects other NDS areas and themes. This high and unsustainable level of population growth is primarily the result of the continued massive inflows of expatriates, predominantly young and less skilled male construction workers. Economic growth has been driven by the growth of capital investment in mega infrastructure projects, including the Rail project, Hamad Port, Hamad International Airport, FIFA 2022 stadiums and facilities associated with this global event, schools and hospitals, all funded with Qatar's hydrocarbon revenues. The growth of the labor force has been a major driver of GDP growth. Labor force productivity (productivity growth per worker) has been low compared with OECD standards, and it declined by 2.4% annually over 2011-2015. With the increasing inflows of expatriate workers, Qatari workers comprised just 5.1% of the country's labor force in 2015, down from 5.8% in 2010 and 11.6% in 2005. The private sector in Qatar economy is overwhelmingly reliant on expatriate workers.

While this unsustainable population growth has advantages in terms of labor market newcomers, it has negative implications on all development areas which are summarized in the NDS-2 thematic report¹⁹ (Population, Labor Force and Sustainable Development).

On top of these negative implications is the imbalance of population structure where the proportion of citizens is significantly lower than that of expatriates. Since 2004, the average increase in the total population has been approximately 10% per annum, while that of Qatari nationals has been around 2.7%. This has led to imbalance in the Qatari labor market; where most expatriates are young males originally recruited to work. This has decreased the citizens' proportion in the labor market from 11.6% in 2005 to 5.1% in 2015 as mentioned above. The 2015 mid-year census shows that 85% of the population were of working age (15-64 years). Males of working age constituted 92.3% of total males, and females of working age constituted 78.7% of total females.

This also caused a gender imbalance in the demographic structure. The 2015 mid-year census shows that the population at that time reached 2.4 million of which 1.8 million were males (309 males per 100 females). However, the gender ratio among Qataris themselves remained normal (99 males per 100 females).

This demographic imbalance caused parallel imbalance in urban expansion in terms of expatriates' concentration in the country. The 2015 census shows that Doha and Al-Rayyan municipalities had 65% of the country's population, while the other six municipalities had only 35%. Al-Shamal municipality had less than 1%, Al-Dhaayen less than 3% and Umm Salal less than 4% of total population.

Unbalanced population concentration has in turn necessitated more housing units, and thus caused expansion of these cities. Meanwhile, it added pressure on the infrastructure (roads, water and electricity), public service centers (hospitals, primary health care and emergency centers, ambulance services), education services (schools, education centers), transport and communications services, entertainment venues and public parks. It also increased traffic congestion and traffic accidents, injuries and fatalities, and caused high rates of delay for work.

¹⁸ Population growth contradicted the NDS-1 forecasts: NDS-1 Book, p 5.

¹⁹ Reference in the population growth section is the Thematic Report: Population, Labor Force and Sustainable Development.

For example, per capita national health expenditure quadrupled between 1995 and 2012.²⁰ Although the report did not make this clear, the increase in health service users has become a key feature of this sector. In general, expatriates living in Qatar require their needs for various facilities be met including an urban expansion or construction of new residential areas. This, in turn, accelerates the pace of urban sprawl. As the population increases, domestic waste increases, which requires more waste treatment efforts. The increase in the number of vehicles and construction equipment required for the growing population is also causing more greenhouse gas emissions and air pollution, as well as bigger amounts of construction and domestic waste.²¹ There is no doubt that the environmental impact is closely related to the population growth, and the living means and technologies used. This large population growth inevitably puts pressure on natural resources, especially freshwater. It also does require greater efforts on water treatment and reuse.

The population's need for more food increases pressure on fish, livestock and agricultural production. The NDS-2 Thematic Report "Population, Labor Force and Sustainable Development", shows that sea fishing increased by 25% from 12,995 mt in 2012 to 16,213 mt in 2014. The average fish catch per vessel increased from 26 mt to 35 mt during the same period. Fish is an important source for food in Qatar and significantly supports its food security. Qatar has taken measures to increase the fisheries stock and improve their management, enforce effective laws and provide the possibility for local aquaculture to meet the population needs.²²

This remarkable population growth has a negative impact on the already scarce water supply. The NDS-2 Thematic Report "Population, Labor Force and Sustainable Development" shows that the share of agricultural sector is 40% of total water resources from all sources and is used for the production of local crops, which meet only 8% of the national demand for food and fodder. The agricultural sector contribution to GDP is 0.13% and it employs 1.3% of the labor force. The sector's economic yield is very modest compared to its use of already limited water resources in Qatar. More importantly, 65% of groundwater is used for fodder farming. Agriculture uses approximately 85% of groundwater and 15% of treated wastewater.²³ Population growth is laying significant pressure on the government efforts to meet the food needs of its entire population, despite the risks to the environment and natural resources. Thus, seeking innovative solutions continues to be a major focus for both water use and waste management.²⁴

With regard to cultural identity, and given the expatriates' diversified nationalities and geographic distribution and cultures (almost from all around the world), the risks of their negative cultural impact on Qatari generations remain significant. QNV 2030 highlighted this issue in the paragraph entitled: "Defining Characteristics of Qatar's Future – Opportunities and Challenges":

To remain true to its values, Qatar must address and maintain balance among five major challenges:

- Modernization and preservation of traditions
- The needs of this generation and the needs of future generations

20 NDS-2 Thematic Report: "Population, Labor Force and Sustainable Development", p 64.

21 Ibid. The Report shows that domestic waste increased from 12% in 2012 to 14% in 2014.

22 Ibid. The Report however attributed the increase in fishing to overfishing. But this justification alone may overlook the fact of the increasing consumption in view of the growing population.

23 Ibid.

24 Ibid.

- Targeted growth and uncontrolled expansion
- The size and quality of the expatriate labor force and the selected path of development
- Economic and social development and environmental protection and development.²⁵

In brief, the existing infrastructure in different service sectors and urban centers needs to be strengthened to keep up with the growing population, while properly planning the volume of investments required to address the current population growth rates at the same current pace. Efforts must be made to avoid any gaps in public safety and security, enhance traffic safety and combat various crimes, especially drug crimes, cybercrime and transnational crimes.

The best solution could be to recruit and retain expatriates with added value to sustainable development, while taking into account all economic, financial, social, environmental, security and other important considerations. This means raising the average productivity of expatriates by making them bear the costs of living in Qatar with their families, which means attracting and retaining highly-productive expatriates who often have high skills and expertise.

Environment conservation and management for the existing and future generations

QNV 2030 aims to realize high-level achievements worthy of the leadership role Qatar intends to assume in environment issues worldwide. At the United Nations Conference on Sustainable Development (Rio+20) held in June 2012, Qatar affirmed its commitment to sustainable development and to achieving an economically, socially and environmentally sustainable future. This will help protect the environment despite the considerable challenges including the rapid population growth. Other critical challenges include: the unique natural environment already under pressure due to accelerated urban expansion; increased air pollution; increased waste; rising surface groundwater levels, lack of sanitation network coverage to all residential areas and pressure on the natural environment. For this reason, the NDS-2 clearly links national growth and prosperity to environmental conservation. Sustainable development represents an obligation to achieve well-being within the environmental boundaries of the biosphere in which the country's population live. Progress can be assessed by the Human Development Index (HDI) as an indicator of development, or the World Wildlife Fund Footprint as an indicator of human demand for the biosphere.

The minimal globally implementable limits of sustainable development are: 0.8 or more for the HDI, and the per capita ecological footprint is less than 1.7 global hectares of biocapacity available globally. Qatar ranked 33rd in the world and the first in the Arab region in 2016 on the Human Development Index.

Qatar's successful bid to host the FIFA 2022 will increase the focus on urban development and Qatar will use this event as an incentive to create public entertainment spaces that will benefit the country and enhance the livability of urban environment. The new spatial framework should be integrated with other approaches to urban sustainability to address transport challenges and reduce disaster risks.

Moving toward environmental sustainability requires effective and responsible institutions, and a culture of evidence-based policies supported by information systems. Equally important is the building of strategic partnerships between the government and key local and international stakeholders, including the private sector and research institutions. Despite the progress made in building partnerships with the private sector, more needs to be done using national and regional environmental efforts

²⁵ QNV 2030, page 3.

which include, but not limited to, civil service, public finance, quality development of government policies, and commitment to implementing these policies by the government and the leaderships.²⁶

The World Bank Index of Regulatory Quality reflects perceptions of the government's ability to promote the private sector development. On this Index, Qatar has also advanced in the past few years to rank 75th, the highest among the GCC countries. At the international level, it is necessary to enhance the effectiveness of Official Development Assistance (ODA). Qatar's ODA exceeds the OECD average, with more than a third of ODA going to development, and almost all the remainder goes to humanitarian aid.

Public institutions, service delivery and fiscal management

The NDS-2 recognized the importance of having effective government ministries and agencies to achieve the QNV 2030 goals, implement development programs and projects successfully and address the population challenges created by the rapid development. The NDS realized that public sector development and modernization require intensive efforts over a long period to increase the State's capacity to carry out its tasks. To strengthen the capacity of ministries and other government entities, Chapter Two of the NDS-2 (on public institutions, service delivery and fiscal management) proposes comprehensive programs that would improve the overall performance through improvements in specific areas focusing closely on the efficiency and capabilities of central agencies (e.g. planning and policy, budget management, human resource development, institutional processes and performance management). They also focus on organizational harmonization, i.e. how to assign tasks and responsibilities and link them to ministries and other government agencies, and how these entities can self-organize internally through the efficient use of advanced technology.²⁷

As noted above, responsibilities were redistributed in some areas to avoid duplication and clarify roles and responsibilities. The mandate of the new Ministry of Finance (formerly the Ministry of Economy and Finance) is focused solely on managing the country's tax and financial affairs, while other economic issues remain the responsibility of the Ministry of Economy and Commerce (formerly Ministry of Business and Trade). Monetary management remains the core competency of Qatar Central Bank.

Now, the previous functions of the Supreme Council for Family Affairs have become within the mandate of the Ministry of Administrative Development, Labor and Social Affairs (ADLSA). The transport-related functions of the Ministry of Municipality and Urban Planning were transferred to the Ministry of Transport and Communications, allowing the former to focus on urban planning and infrastructure. The Public Works Authority (Ashghal) became under the responsibility of the Minister of Municipality and Environment.²⁸ Responsibility for NRM (including groundwater resources) was moved from the Ministry of Municipality and Environment to the Ministry of Energy and Industry,²⁹ allowing the latter to focus on the management and development of natural water resources to address their depletion.

In order to enhance planning and improve performance and service delivery, standard departments of planning and quality were established in each Ministry reporting directly to the Minister. These departments are responsible for "developing the Ministry's "general strategic plan" in coordination with the competent authorities and related administrative units and taking measures for approval", among other functions. These units are focal points in charge of monitoring and following-

²⁶ A User's Guide to Measuring Public Administration Performance, UNDP 2009

²⁷ See Part Two below.

²⁸ Pursuant to Article 3 of Emiri Decision No. 44 of 2009.

²⁹ Emiri Decision No. 16 of 2014 as amended by Emiri Decision No. 4/2016 sets out the mandates of ministries.

up, reporting, evaluating institutional performance and developing and mainstreaming management processes that enhance efficiency. While these changes will take time to impact the effectiveness of the government and institutions in general, it helps to mainstream the NDS and support enhancing alignment and coordination among ministries and government agencies.

Improving service delivery and e-government

In June 2011, the then Ministry of Communications and Information Technology (now Ministry of Transport and Communications) issued its comprehensive plan entitled “Digital Agenda 2015”. This agenda was organized into five strategic thrusts that support the QNV 2030 aspirations and the NDS economic and social targets. The two themes “Improving access to public services” and “Enriching community benefits”, which includes e-health and e-education services, are particularly important in modernizing the public institutions.

Ministry of Transport and Communications now provides e-services more efficiently. Hukoomi (the e-platform for resident and visitor services and transactions), Al-Meezan (Ministry of Justice portal for legal information) and Al-Nadeeb (Qatar’s one-stop-shop for customs clearance) have already started to work. As of mid-2014, Hukoomi initiative has been well on its way to handling more than 50% of government services. MTC provided technical assistance to more than 20 government agencies during the establishment of its own ICT platforms, and has also linked 29 government agencies to an integrated e-government network.

There is also Metrash Service at the Ministry of Interior. After adding Metrash 2 services, this program now provides 141 e-services to customers through mobile phone applications. These services include: traffic, residency, exit permits, visas, e-portal and inquiries, in addition to other public services.

Moving forward with the HRD agenda

The NDS-2 seeks to further develop and improve educational and health services, thereby improving the quality of education outcomes to meet the needs of the labor market through providing educational opportunities for the entire population, developing curricula to keep up with global scientific and technical developments and in line with the requirements of the local labor market, expanding primary health care, activating professional control over health service institutions, encouraging the private sector to invest in health, and empowering, integrating, caring for, and enhancing the productivity of the national labor force. The pillar also includes recruiting and attracting highly qualified expatriate workers to serve the knowledge economy.

Expanding the social protection network

To continue the efforts of the NDS-1 social protection programs, the NDS-2 will seek to expand the social protection network, develop targeting mechanisms, increase the allocated resources and activate their social role for the benefit of the target groups through adopting small-scale enterprises, expanding financing mechanisms and programs for small-scale enterprises and developing training and orientation programs to upgrade their production capacities and skills.

Developing external relations and improving the conditions of exchange and competition

As a continuation of economic openness and foreign trade liberalization policies, the Strategy attaches great importance to strengthening external relations and economic and trade partnerships with all world countries through enhancing the efficiency of commercial transport; providing trade support services; developing industrial zones; completing the expansion of Hamad International Port and Airport; strengthening the competitiveness of the national economy; exploiting opportunities and comparative advantages of non-oil exports; promoting opportunities for attracting FDI in production, service and oil and gas sectors; and encouraging the private sector to benefit from economic relations with countries around the world.

Building institution-level planning frameworks

Coherent and systematic planning frameworks are essential to strengthening institutional work, capacity development and improving public sector performance and service delivery. Planning and quality control departments in a number of government entities still need additional expertise. Attention should be given to capacity-building in these units if further progress is to be made in performance management, monitoring and reporting, project development and implementation and the introduction of modern budgeting and financial management processes³⁰. However, each ministry now has a center to coordinate the development of strategies and plans. Yet, it should be clear that creating new organizational units does not automatically mean the availability of important capacities, which provide the ability to design projects and manage the entire organizational planning process. Some planning and quality departments now focus on handling planning and coordination work in collaboration with third parties. This must facilitate the process of acquisition and transfer of knowledge rather than considering it as an independent product.

In this planning process, MDPS is responsible for the programs supporting the development of government strategic and operational plans. However, MDPS will only provide support, rather than participate in implementation. Finalizing the plans and preparing necessary processes will be the responsibility of the respective ministry or entity. Through this support, MDPS continues to provide guidelines for plans development and promotion of knowledge sharing and transfer. MDPS reviews the implementation plans regularly to ensure alignment with QNV 2030 and NDS.

Following-up and deepening administrative and legislative reforms

The NDS-2 seeks to remove all impediments to private sector involvement through improving the business climate, simplifying government procedures, eliminating shortcomings in the business environment and enhancing the sustainability of public finance by improving the efficiency and effectiveness of government spending, restoring balance between expenditures and revenues through rationalizing current expenditures and increasing investment spending in production sectors, enhancing the effectiveness of monetary policy, ensuring that the private sector receives adequate credit to support economic growth, pursuing structural reforms to modernize fiscal management, reforming civil service by linking pay to work, and improving management in general.

Fiscal Management

Part II summarizes the (MoF) efforts to modernize budget management in light of broader fiscal reforms. These include the preparation of a three-year forward-looking budget and the establishment of a financial information management system to automate and integrate financial management processes and budget reports. The modules of the system, currently being tested, are planned to be implemented. A public sector procurement law³¹ and a fiscal management law³² have been prepared, and the latter will provide the powers and regulations to review the budget processes. New budget classifications have also been developed and tested and they will shift focus from major expenditures and inputs to programs and outputs.

30 Recognizing the important role of planning and quality departments at all ministries and government entities and institutions in the success of development strategies and plans, the Deputy Prime Minister and Minister of State for Cabinet Affairs issued Circular No. 3 of 2017 on 17/7/2017, which included the Prime Minister's directives on activating such departments in various organizational structures to efficiently perform their roles in accordance with these structures.

31 Law No. 24 of 2015 on regulating tenders and auctions (13 December 2015).

32 Law No. 2 of 2015 on Qatar Fiscal Policy (14 June 2015).

6. Conclusion

This part clearly shows that a significant progress has been made in raising awareness of the importance of QNV 2030 and of sustaining momentum and motivation in line with its guidelines and at the level of its pillars. This will consolidate the values and culture of comprehensive national planning of the agreed national development programs and projects as provided for in national development strategies and the emanating and complementing strategies and plans; ensure that work is done in accordance with drawn up strategies and plans; acquire the required implementation capacities; establish a culture of planning, action and achievement; and ensure that government spending is linked to the set plans and programs and to the priorities and targets contained therein.

Part I: Towards the Year 2022



Chapter II: Economic Performance and Future Prospects (Outlook)

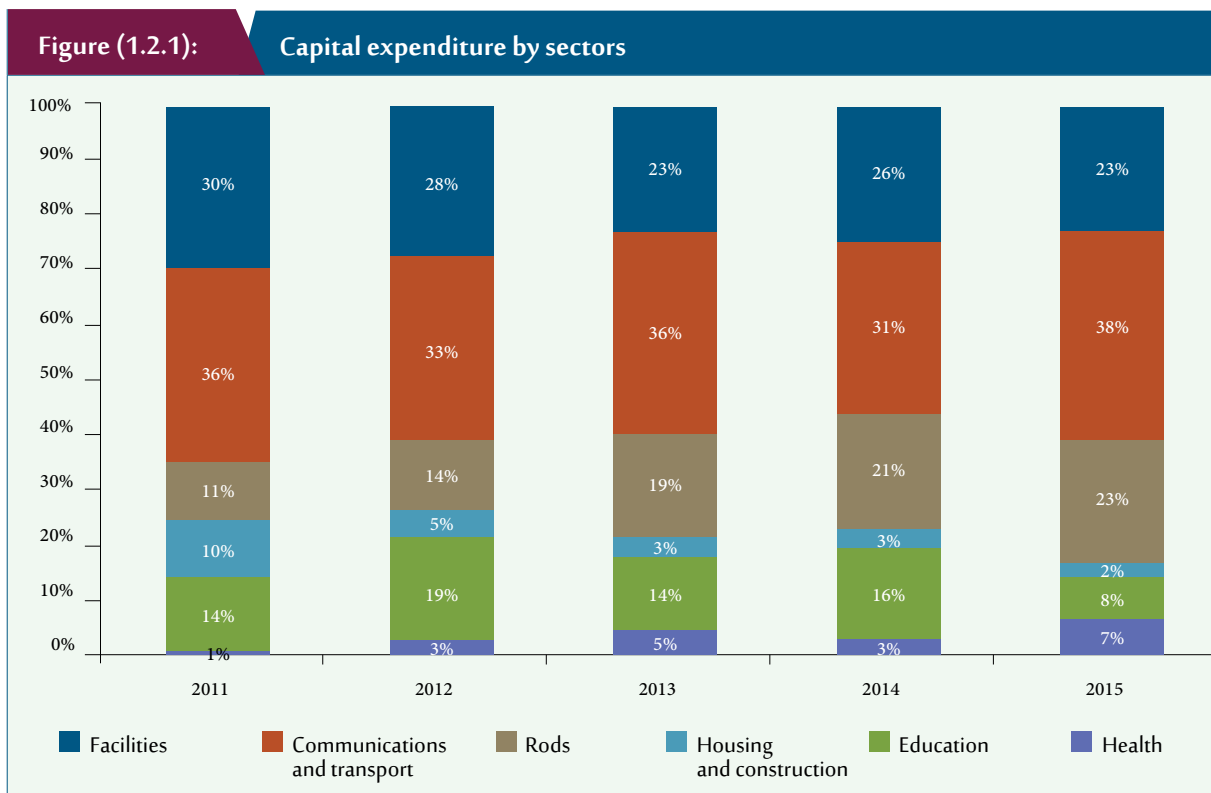


1. Introduction

Despite the continuous expansion of Qatar’s economy during the period 2011-2016, the first year of the NDS-1 period marked the end of the remarkable growth of the hydrocarbon sector. The following five years were characterized by the dominance of local government investments in the nonhydrocarbon sector . In the midst of the transition to the NDS-2 period , Qatar will focus on reforming the policy and motivation areas, enhancing productivity at all levels and strengthening economic diversification efforts. Participants in the NDS-2 will focus on strengthening their institutional and organizational capacities, developing incentive frameworks and policies to attract the private sector to , enhance its contribution to the local economy and raising productivity at all dimensions. The real economy is expected to grow during the period 2018-2022 due activities in the nonhydrocarbon sector, especially tradable commodities and services sectors. The 2018-2022 period will clearly be marked by the rationalization of government spending, which will, in general, lead to equilibrium in Qatar’s fiscal balance sheet and facilitate wider private sector activities.

2. Economic performance during NDS-1 (2011-2016)

The performance of Qatar’s economy exceeded expectations during the period (2011-2016) due to major investment spending momentum and its impact on economic sectors. Public investment spending grew at a CAGR of 12% during the NDS-1 years as a result of infrastructure and health and education projects (Figure 1.2.1). This was accompanied by an increase in private investment and SOEs investment, which accounted for 78.5% of total fixed capital expenditure. As mentioned above, while the previous record economic expansion stopped in 2011 with the completion of the last LNG project (Qatar Gas 4), the growth of Qatar’s economy outpaced the world economies for the remaining period of NDS-1.



Source: MoF, Qatar

High oil and gas prices and the extensive use of available assets in the hydrocarbon sector have all contributed to Qatar's national income, which was reflected in significant increase in current and capital public spending. The fiscal policy has been expansive due to the high oil and gas revenues, and the interest rate policy was overshadowed by changes in US federal reserve interest rates. The average price of oil was \$ 86.30 per barrel during the period 2011-2016, with a peak of \$ 123.99 per barrel on March 9, 2012. Meanwhile, the average annual current expenditure increased by 11.7% and the capital expenditure increased by 9.4% during the same period. The targeted increase in capital expenditure significantly stimulated the economic activity, including the average annual population growth rate which was 7.4%. This population increase - resulted mainly from the increasing number of expatriate workers in capital projects - caused higher domestic demand for goods and services, which in turn expanded the real economy.

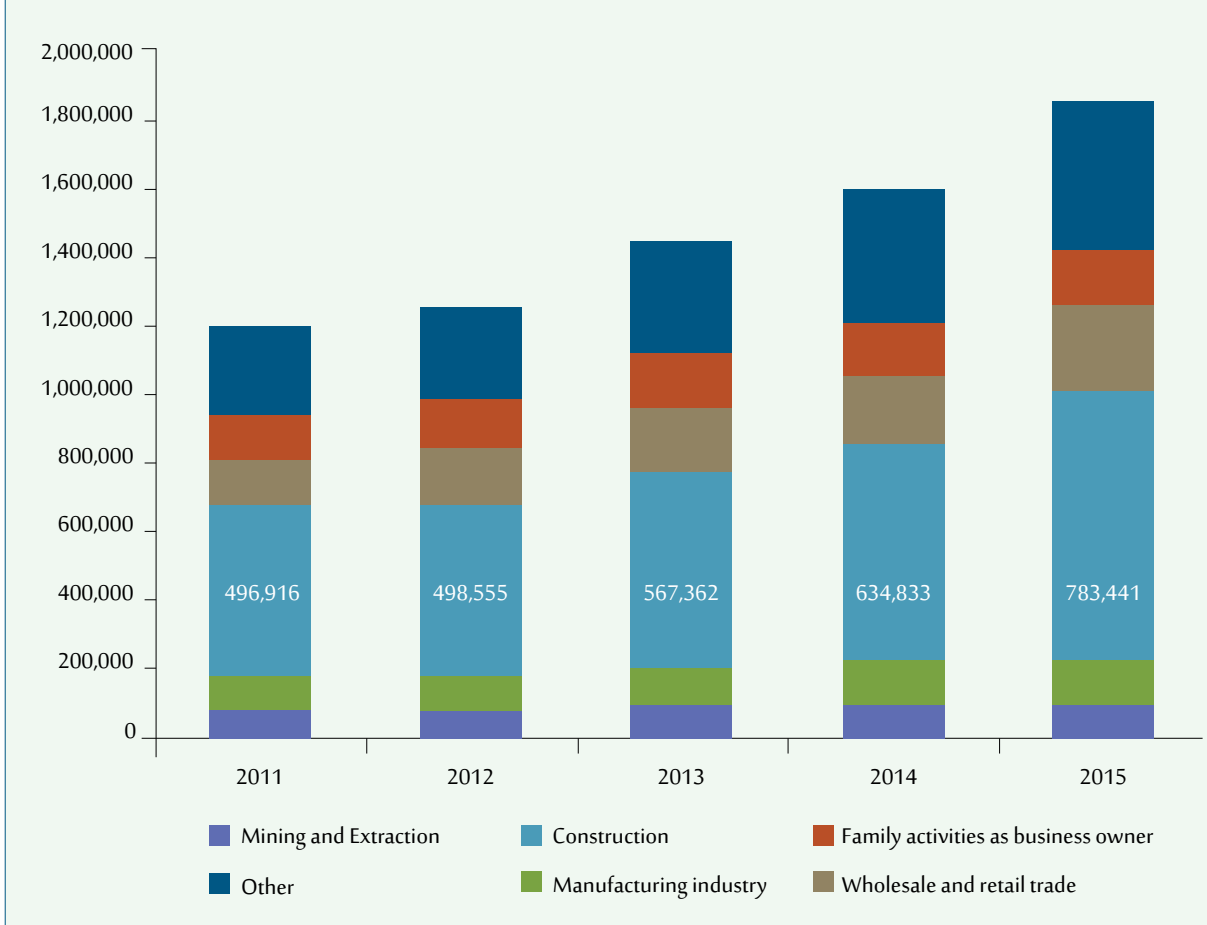
Economic expansion has been achieved despite the continuous decline in productivity. The total factor productivity (TFP), reflecting total capital and labor productivity, technological progress and efficiency, has been consistently negative during the period 2011-2015 and it decreased at an annual average of 4.6%. With the rapid increase in the labor force, the continuous decline in labor productivity (which dropped by an annual average of 2.4% over the same period) constitutes an important economic challenge.

The drop in oil prices at the end of 2014 caused a sharp reversal in Qatar's economic growth dynamics. The nominal GDP growth rate declined by 20.2% in 2015 due to the decline in oil and gas export revenues and restricted public spending. During the same period, available liquidity decreased by 1.1%. The MoF efforts to rationalize public investment spending have also led to the rationalization of current spending. However, public capital expenditure remained high due to the commitments to carry out development research projects in the country. The ratio of total gross fixed capital formation to nominal GDP was 45.3% in 2015, which is more than twice the OECD average (20.6% in 2015). The average total investment during the NDS-1 years was about 44.5% of GDP.

Qatar's economic growth model - driven mainly by the expansion of the construction sector due to a significant inflow of unskilled expatriate labor (Figure 1.2.2) - has created high-level infrastructure, high income levels and improved living conditions for Qatari nationals. (Figure 1.2.2)

However, this model has not succeeded in rooting the foundations of a knowledge-based economy, and has raised challenges related to national identity, heritage, culture and community values. Heading towards a knowledge-based economy will allow Qatar to join the developed countries with the highest income and development levels and the most successful emerging economies. Countries such as Japan, South Korea and China, at the beginning of their industrialization process, focused on receiving, adopting and understanding technologies and innovations, and then reproducing and inventing them, as did many emerging countries. Without changing the growth model, Qatar will not be able to move to an advanced development stage. This requires a focus shift from infrastructure construction to policies and regulations that: improve the education; change the labor skill composition; allow the flow of knowledge and the introduction of advanced business practices; encourage greater private sector participation in economic activity, on its own or through PPP frameworks, especially in sectors and industries that provide more innovation and discovery opportunities; and change the work values of local workforce and encourage them to enroll in scientific and technical education.

Figure (1.2.2): Distribution of expatriate labor by main sectors



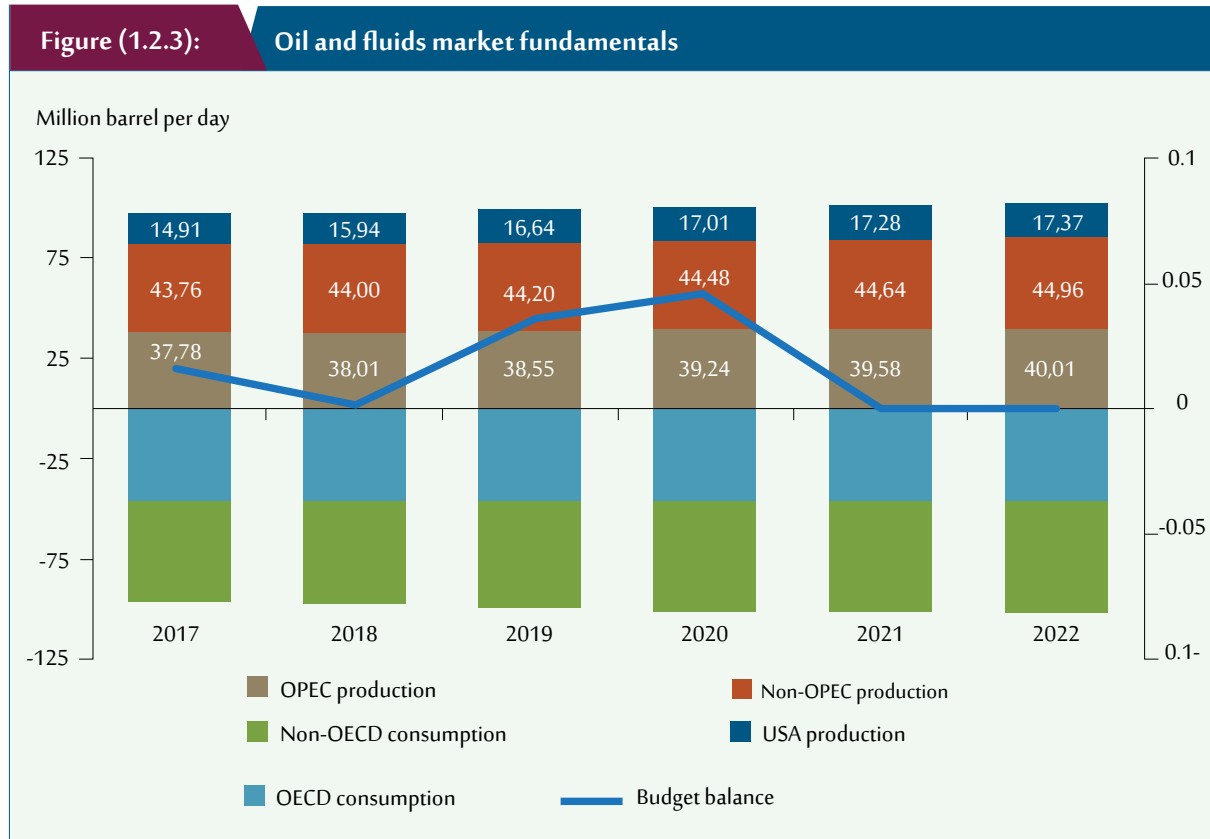
Source: Ministry of Development Planning and Statistics

Such transformation will take time before yielding results. Its impact will be felt in the final years of the NDS-2, which is expected to establish the required platform for the desired transformation that will enable Qatar to grow sustainably.

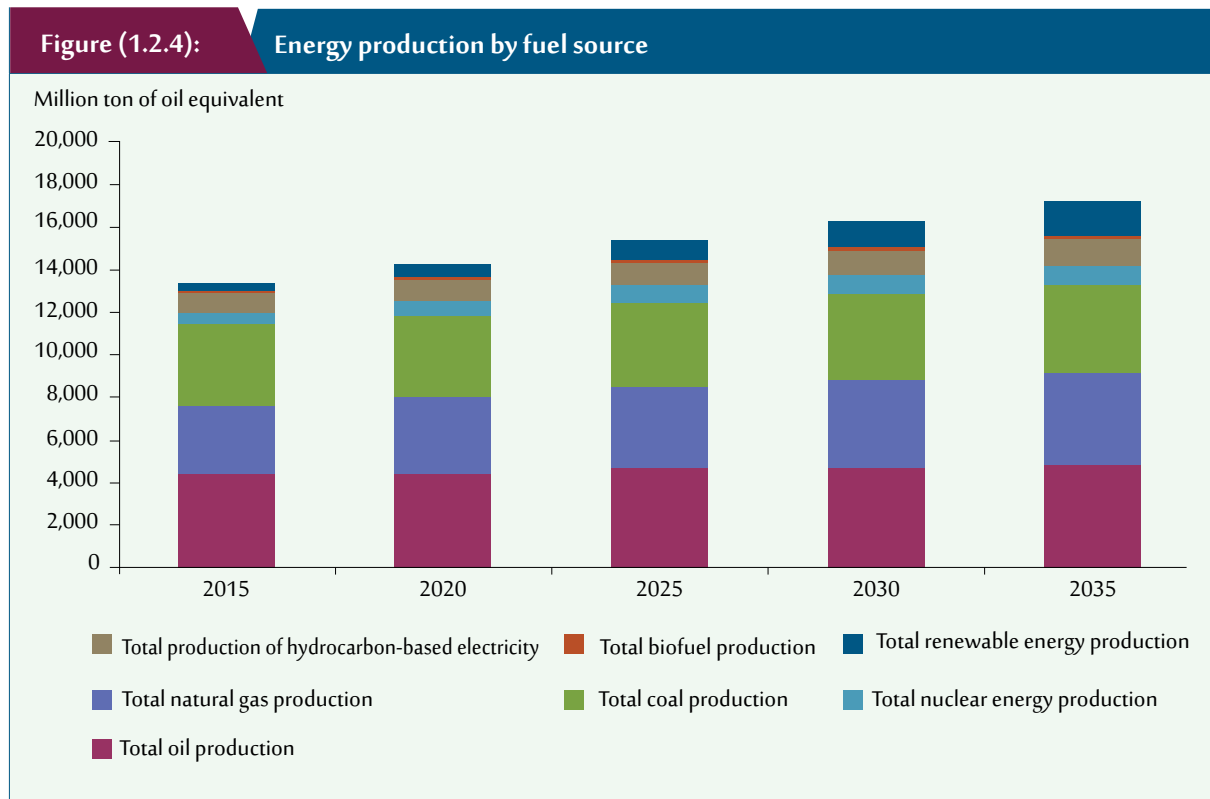
3. Economic Outlook (2018-2022)

Qatar's economy is relatively small land open and is directly affected by the variable global economic conditions. The development of NDS-2 comes at times of high uncertainty, especially regarding future oil and gas prices. Therefore, it is important to take into account the current realities of the national economy as well as the domestic and external changes formulating Qatar's economic outlook.

The steep decline in energy prices is unlikely to have full impact during the NDS-2 period given the fundamentals governing the world's oil and gas market, the behavior of the new major market player (the United States), and the continuous advancement in exploration and drilling technologies. While the volume of surplus crude oil production and reserves is likely to ease somewhat in the short term, the emergence of new producers in North America, East Asia and Africa (Figure 1.2.3) as well as the increased investment and use of renewable energies (Figure 1.2.4) to address pollution and climate change, will all lay pressure to reduce oil and gas prices over the medium and long terms.

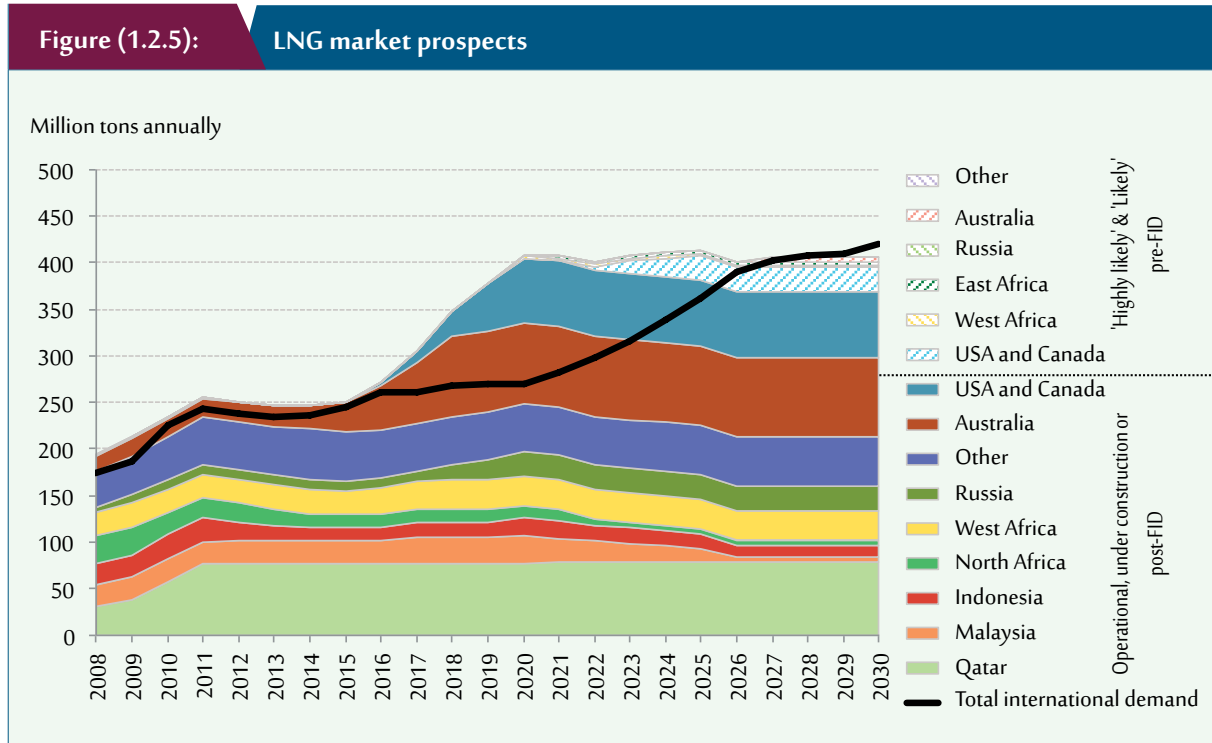


Source: US Energy Information Administration: Energy Outlook 2017



Source: British Petroleum: Energy forecasts 2017

Looking beyond the NDS-2 period and although the outlook for natural gas market in the long term seems more promising than the crude oil due to the increasing desire to use it as a clean source of energy, a surplus is expected in the LNG market in the short and medium terms until 2025, leading to a price stagnation or even a price decline (Figure 1.2.5)



Source: Bloomberg New Energy Finance. Data of this figure were collected before the investment decisions of 2017.

In addition to low energy prices, modern technologies are also causing major changes in global production processes and trade methods. Thus, the reduced production cost resulting from the use of new technologies (involving less labor and capital) increases returns for entrepreneurs and investors and opens up great prospects for new market entry. If Qatar does not adopt new technologies, it will end up lagging with its efforts to diversify the economy and expand non-hydrocarbon exports³³.

In addition to the above-mentioned risks, the possibility of a shift towards protectionist policies that could ignite trade and exchange-rate wars among the world's major economies is blocking global economic growth and slowing world demand for energy and non-energy goods. This is another risk of negative dimensions that the Qatari economy may face during the forecast period.

4. Economic outlook according to baseline scenario (2018-2022)

This scenario assumes that oil and gas prices will remain near the January 2017 levels. Taking into account the above-mentioned uncertainty in the oil and gas markets, there is no justification for expecting significant changes over the medium term. With oil and gas prices expected to remain near the current levels for a long time, fiscal rationalization measures will continue until fiscal balance is achieved. Rationalization is expected to be mainly in the current spending, which in turn

³³ Qatar has made significant strides in establishing three special economic zones that can embrace high-tech emerging industries that contribute to economic diversification.

means a drop in demand for goods and services in the domestic market. Meanwhile, the government will focus on securing the capital spending required for all major projects, including those related to hosting the FIFA 2022 World Cup, but within prudent budgets. In parallel, the government will undertake policy reforms towards enhancing the business environment, encouraging private sector participation in knowledge-based sectors, and raising the TFP levels. The private sector is expected to respond positively to these reforms and increase its investments in the local economy. Continued additions to capital stocks will enhance the growth of the non-oil sector to offset the decline in the hydrocarbon sector, which will help keep the real GDP growth rate between 2.1% and 3.0% during the period 2018-2022, based on optimistic assumptions.

The growth model based on increasing capital stock and promoting TFP will result in very narrow surpluses in the general fiscal balance and limited positive balances of the current account. Although current spending is expected to drop from about 32.6% of GDP in 2015 to approximately 21.2% during the NDS-2 period, the overall fiscal balance will barely register surpluses. Meanwhile, given that both government and private sectors will continue to invest, the current account surpluses, which used to be very big, will become lower during the forecast period. The limited external balance surpluses will decrease the net transfers to Qatar Investment Authority and reduce the national saving rate³⁴ from 53.5% during NDS-1 (2011-2016) to 45.8% during NDS-2 (2018-2022).

Sustainable economic expansion will depend on the efforts to strengthen policies and legislation. However, consistent and more efficient distribution of public spending will play an important role in strengthening growth in certain emerging service sectors. Relying on the government to finance the growth of these sectors will at the beginning undoubtedly put pressure on the public finance, but as the business progresses, private sector funding is expected to assume greater role in supporting their growth and development. Introducing a sustainable model for development would strengthen the prospects, immunity and prosperity of Qatar's economy in the longer run.

5. Conclusion

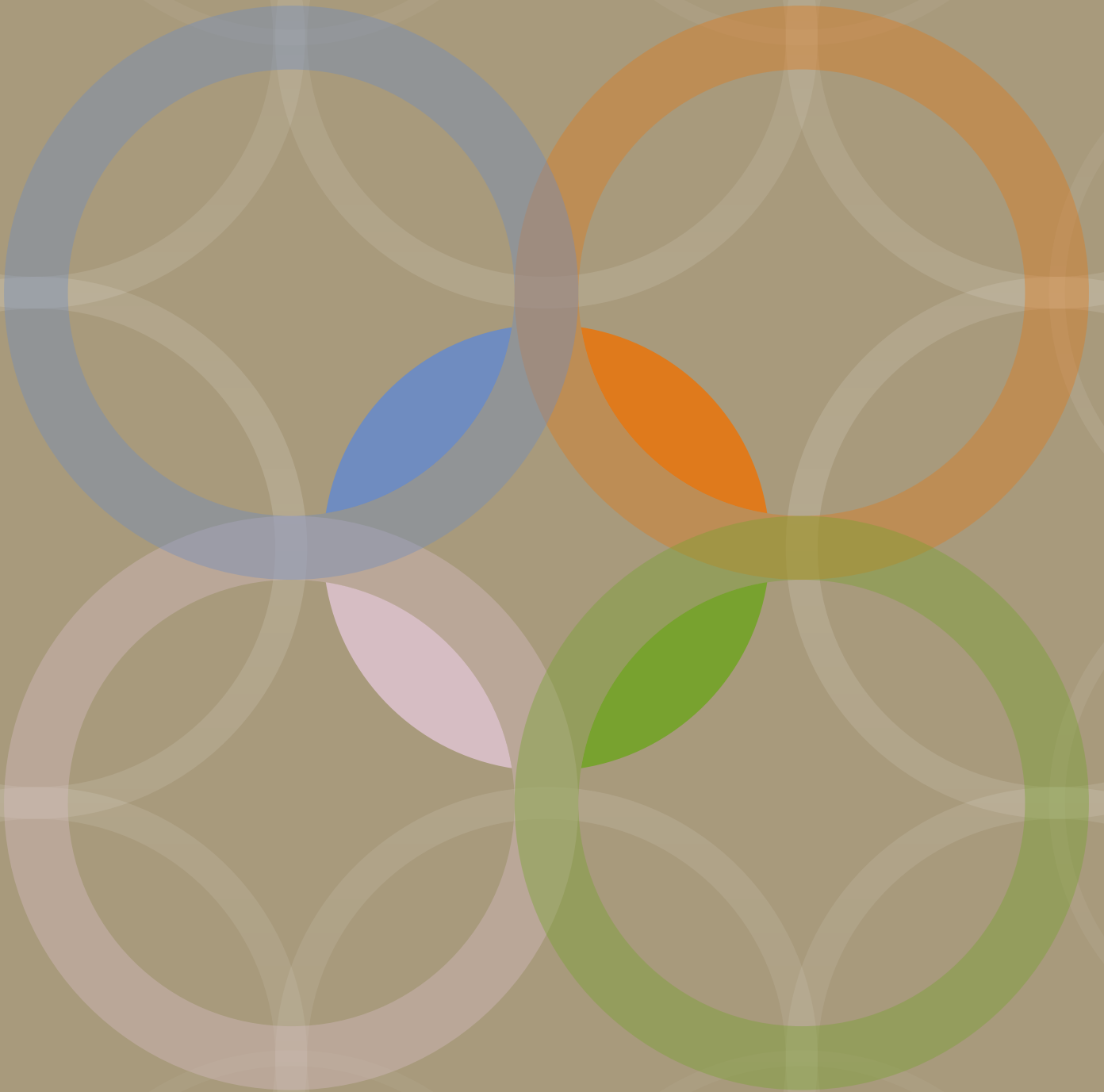
This chapter as well as the economic performance of the NDS-1 show that maintaining efficient economic performance to achieve the QNV 2030 goals must be linked in an institutionalized, smooth and sustained manner to sustainable development programs and plans. While considerable legislative and regulatory efforts have been made to consolidate these values, achieving sustainability in this aspect requires integrated, continuous and unremitting efforts based on distinguished international experiences to build and sustain institutional and human capacities of the national economy, as a national wealth and inheritance for future generation.

³⁴ $(\text{Nominal GDP}) - (\text{private consumption} + \text{government expenditure}) / \text{nominal GDP}$

Part II: Institutional Development, Service Delivery and Fiscal Management



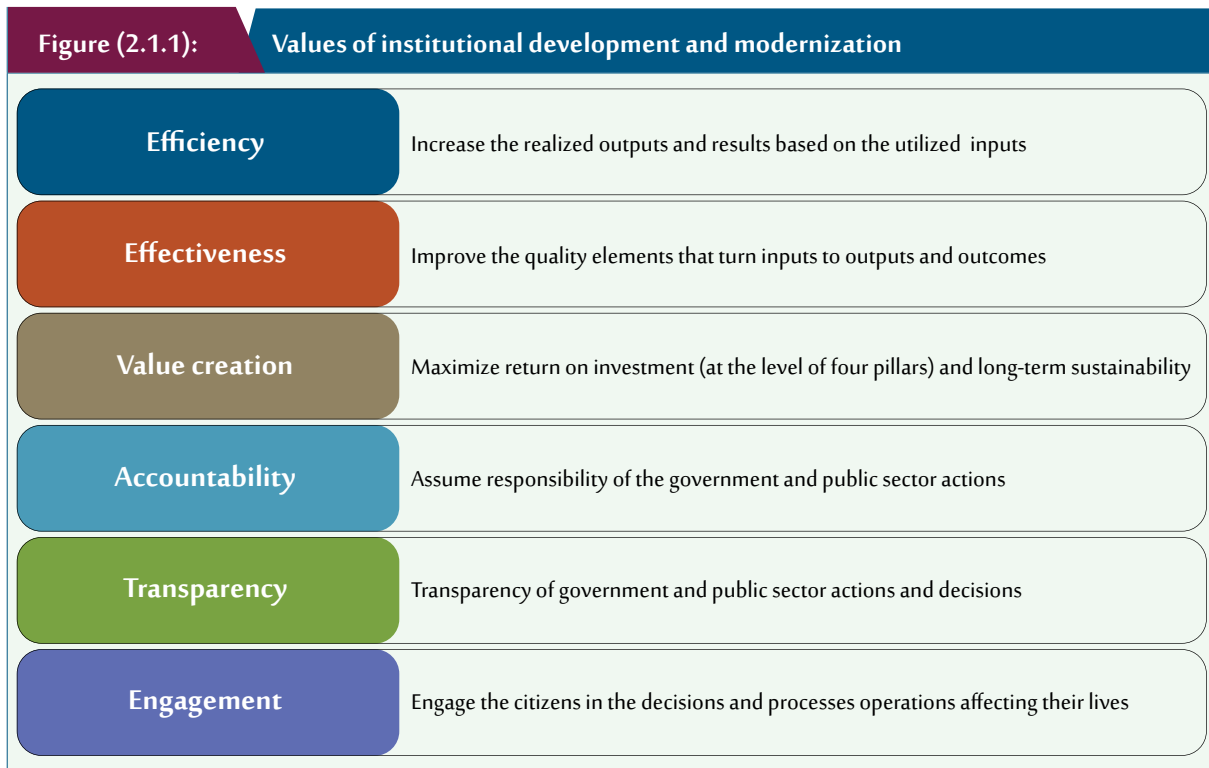
Chapter I: Institutional Development, Service Delivery and Fiscal Management



1. Introduction

Development requires the modernization and improvement of public sector institutions and entities, with special focus on the main features of a modern state³⁵ and greater efforts to adopt the values of institutional modernization and development (Figure 2.1.1). It also requires systematic progress in all its eight focus areas to achieve institutional excellence. Service performance may not be separated from institutional organization and development. The positive effects of quality institutional organization, clear plans and integrated policies and optimal use of human and financial resources enable the delivery of outstanding public services, performance monitoring and accountability (Figure 2.1.2).

QNV 2030 maintained that achieving the desired transformation requires the development of institutional and organizational capacities, particularly strengthening the central government functions (finance, planning, IT and human resources). Despite the significant development over the past few years in establishing capacity building foundations (the first stage of institutional development), the transition to embedding institutional capacities in order to reach institutional excellence requires stronger central functions to establish the empowerment factors as an institutional legacy of the State of Qatar, especially with the rapid development movement.



Addressing the challenges facing the government sector was the focus of the NDS-1 (2011-2016), which is committed to an ambitious national agenda. By the end of 2016, a significant progress had been made in a number of institutional development areas, including fiscal management. These achievements constitute the starting point of the institutional development and modernization strategy 2018-2022 or even a continuation of this strategy. Most of the targeted outcomes in the sector and fewer targets will be extended over the coming period, due to their overlapping nature, to specific difficulties encountered or to their protracted nature. Thus, they will have greater momentum in the coming period. Another set of specific targets

³⁵ Modernity is a comprehensive concept aimed at introducing the values of a modern state to develop and maintain institutional capacities in line with the focus areas.

emerged, coupled with the respective interventions, in response to changes in the surrounding economic, institutional and organizational context. Unfulfilled targets were also adjusted to improve integration, with greater emphasis on constituent conditions within programmes and projects, and on defining the chronological and reference issues.



2. Progress in achieving the outcomes and targets of institutional development, service delivery and fiscal management (2011-2016)

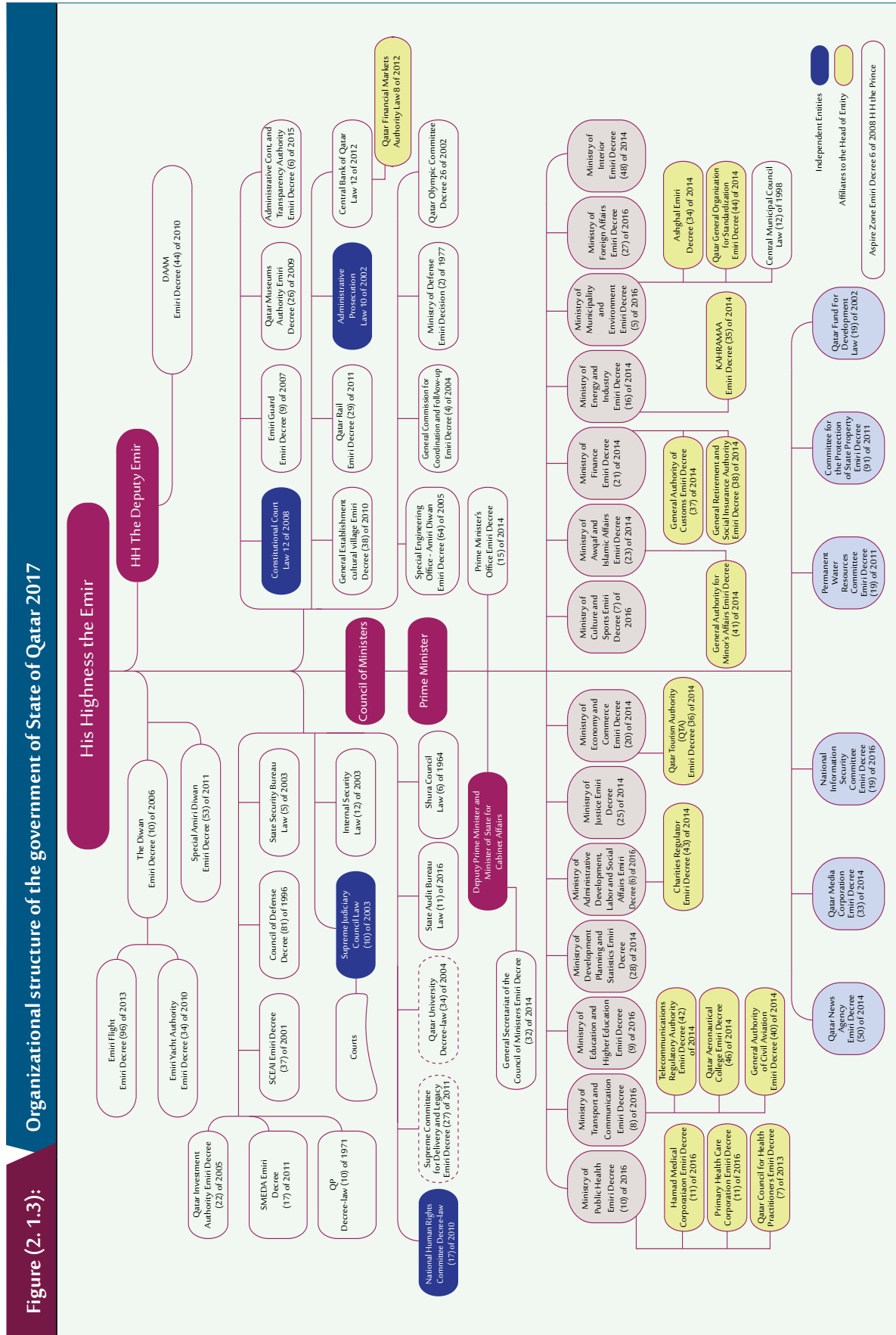
Organizational consistency and the change in management landscape

Qatar's management landscape has changed dramatically since the launch of NDS-1 (2011-2016) in 2011. There was a government restructure in 2013 and in 2016. The prominent features of this restructuring were: (1) the gradual transition from supreme councils to ministerial portfolio system and the consequent re-integration of some supervisory functions of certain entities with operational functions³⁶; (2) reducing the size and expenditure of the government apparatus by merging specific ministries and agencies to lead larger sectors that complement each other (Figure 2.1.3). Remarkable efforts were made to avoid overlapping and conflict of powers, and to achieve clarity of tasks and responsibilities. The restructuring has expanded some sectors and reduced others, including entities handling central government functions. Despite the significant progress towards coherent structures of government agencies, less efforts were made in managing and directing the workforce to address staff shortage or surplus. Tangible progress has also been made towards rationalizing government spending, particularly wages and salaries. Standards were set to control administrative expenses, and some allowances were revisited and some discretionary items were also suspended for non-eligible categories. Controls were introduced to facilitate transfers between budget lines

³⁶ In Article 20 of Law 8 of 2009, promulgating the Human Resources Management Law, the Council of Ministers classified the governmental entities according to the nature of the competencies, functions and tasks entrusted to them into: advisory/supervisory entities and operating entities. The first prepare and oversee the implementation of public policies, whereas the second implement these policies or manage and operate facilities and provide public services.

to cover deficit in any item without the need to reinforce the allocations of Chapter I (Wages and Salaries). Disbursement for the allocations of Chapter I was also monitored and reconciliation with the accounting records was ensured through the disbursement control screens. With regard to government performance measurement, a handbook on “Institutional Performance Standards for Government Entities”, was issued by virtue of a circular from the Prime Minister’s Office in June 2014. The handbook provided a reference for determining the criteria and standards of measuring government performance³⁷ and it is being gradually implemented since 2016, through the follow-up of government agencies implementing three main areas that include 12 key criteria. However, the formulation of a general framework for evaluating government performance will be more effective with the engagement of non-government entities that are objective, impartial and highly skilled , while ensuring the representation of government service recipients.

³⁷ Emiri Decree No. 6 of 2016, on the organizational structure of the Ministry of Administrative Development, Labour and Social Affairs (Article 16).



Source: Ministry of Administrative Development, Labour and Social Affairs, February 2017

Institutional processes and improving the efficiency of government services

The government sector has made significant improvements in service delivery through one-stop shops, facilitating access to a wide range of government services in one place and within a short time. These developments include the establishment of government service complexes nationwide. So far, there are 10 complexes, hosting seven government entities that provide 340 different services. Preferential services have been added for specific categories, such as the elderly and persons with disabilities. Working hours have been extended to include morning and evening shifts, with continuous coordination between the complexes and decision makers in the ministries to ensure smooth work flow. Improvements in institutional procedures and access to government services are not limited to the establishment of these service complexes, but also include the automation of a large number of government services to make them available to beneficiaries around the hour through the official government agency's websites or through Hukoomi portal, in addition to the development of related smart applications. At present, Hukoomi portal offers around 400 services, including more than 150 e-services that are totally accessible online for businesses, citizens, residents and visitors. Future challenges include how to (1) increase alignment among government services and link them to the databases operating them; (2) manage the government information efficiently and use them as guidelines for planners; (3) organize the use of the high-volume data and protect their privacy; and (4) protect the government technology infrastructure from electronic risks.

On the ground, MDPS conducted the first comprehensive survey on public satisfaction with government services in May 2016. The results of this survey are used by the concerned authorities to improve their services. Survey institutionalization will be a priority in the next phase as it will be conducted regularly while expanding its coverage and enhancing its content. MDPS also conducts periodic surveys exploring the business sector and investors' views on business environment (Survey on confidence in Business Climate index) and on households' satisfaction with the service quality and prices of consumer goods (Survey on Consumer Confidence Index in Qatar). The Competitiveness Survey, developed specifically for the purposes of the International Institute for Management Development in Switzerland (IMD), provides important indicators of business views in four key areas: economic performance, government efficiency, business efficiency and infrastructure. Together, these surveys provide important indicators on government performance and services. Public services can be categorized in three as per the targeted beneficiary group:

- **Central government services:** central government services that directly support service delivery to businesses and the public by horizontal departments. These central services are: (a) Financial services, including government budgets and procurement; (b) Planning, including key priorities and strategic outcomes to be achieved; (c) Regulations, which defines mandates and performance powers, establish accountability and organize relations among entities. (d) Human resources, since the human being is the instrument and purpose of development. (e) IT: the nerve of administrations in today's world.
- **Government services to the public:** the public services provided by the government to the beneficiaries (citizens, expatriates or visitors). which are continually improved by the government.
- **Government services to businesses:** They cover services for starting or registering businesses, providing business environment, attracting foreign investments and capitals, business taxation, etc.

The NDS-2 strongly recommends greater and more effective engagement of the private sector in all services, to increase the efficiency of private companies, enhance competition, strengthen the labour market and provide opportunities for world-class partnerships.

Box (2.1.1) Survey on customer satisfaction with ministries and other government agencies' services

In May 2016, MDPS carried out the first broad survey on customer satisfaction with government services. The survey covered 5,369 beneficiaries from all segments of society and was translated into several languages to ensure the largest possible coverage of non-Arabic-speaking beneficiaries. The survey was conducted through interviews in homes, public places, service centers and online. It covered more than 300 services provided by 20 ministries and government agencies. The survey addressed topics like accessibility and coverage of services, utilization of e-services, if any, customer satisfaction with the services (of ministries in general and of each ministry separately) in terms of accessibility, clarity of regulations and procedures, staff performance and knowledge, delivery time, fees, transactions follow-up, response to complaints and inquiries, e-service quality, availability of parking lots and waiting places, availability of health facilities including for persons with disabilities and the elderly, and working hours. Beneficiary engagement and feedback on public services is a key practice when it comes to empowering the public-sector performance. These will be institutionalized and implemented systematically as a planning tool in the various ministries to develop and improve service efficiency.

Common technology infrastructure of the State

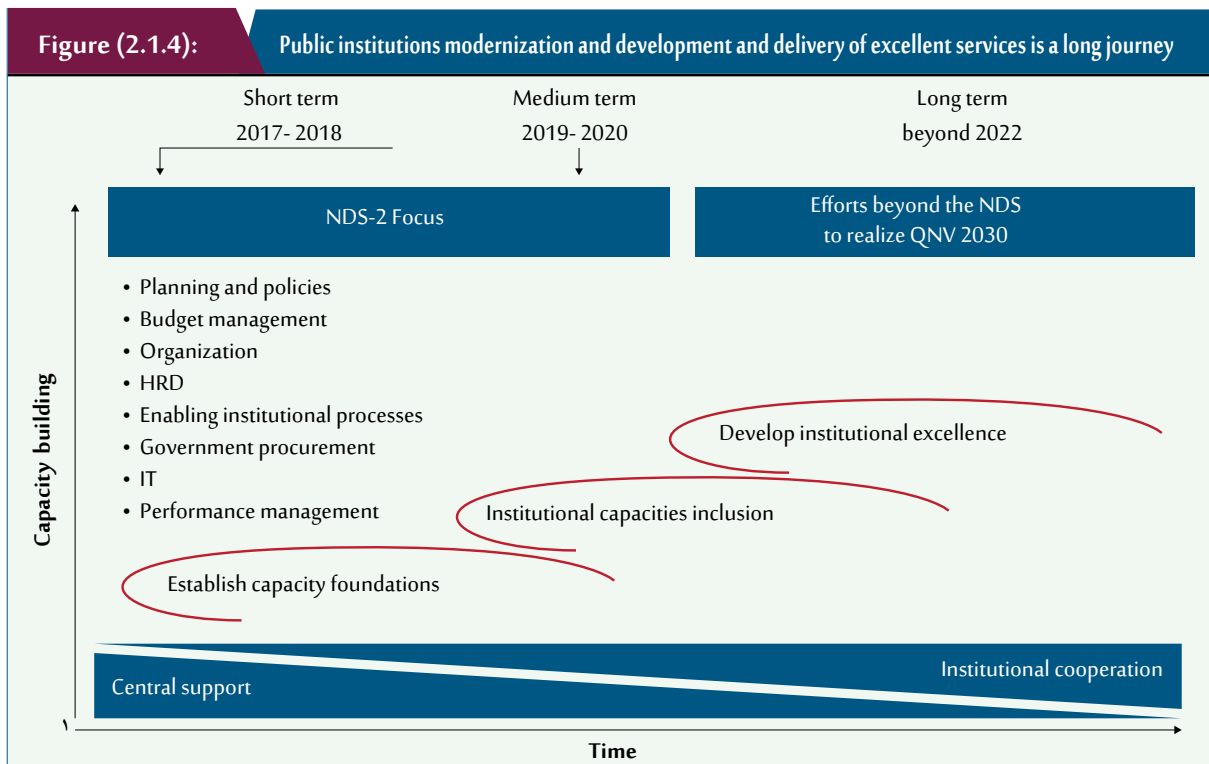
The development of government infrastructure includes 8 key components: (1) Improving the government network and deploying the broadband network across government agencies; (2) Establishing a data center to host government data packages; (3) Establishing a crisis response center to support government data; (4) Establishing a cloud technology infrastructure; (5) Expanding the government call center; (6) Establishing the necessary infrastructure needed to activate the use of e-signature; (7) Providing integrated digitization service; and (8) Establishing an internet service platform supporting ministries work. In this context, 29 government agencies are linked to the common technological platform which provides all government services. Related policies have also been developed. Four entities have already benefited from the current host center. The Government Call Center has deployed and provided technical support to 20 government services. A platform for sharing government data has been established according to standard specifications and practices. It offers nine basic data packages provided by six ministries/agencies: Ministry of Economy and Trade, Ministry of Justice, Ministry of Public Health, courts, Kahramaa and Ministry of Interior.

Strategic planning and coherence of government policies

Development planning processes are one of the central functions of government. The sectoral strategies, whose components constitute the national development strategy, are the mechanisms that translate the QNV goals into reality. In order to ensure the integration of the planning system, continuous coordination among all government agencies is required throughout the planning cycle. While remarkable progress has been made at the higher levels of the multi-level planning pyramid, institutional planning remains below ambition. Some government agencies lack medium-term institutional strategies and short-term output plans that reflect their commitment to QNV. Most government agencies lack monitoring, follow-up and evaluation systems.

The State has also strengthened the central planning function by establishing a ministry of development planning and statistics in 2014 linked directly with the Council of Ministers. Standardized Departments of Planning and Quality have been also created in all ministries, which would strengthen the linkage between plans and budgets and fill the planning framework gaps. These administrative units will also form link between ministries and the central authority managing the planning processes. It is also necessary to build the capacity of the staff of these departments, consolidate the NDS monitoring and follow-up system and shift from emerging monitoring systems and mechanisms to more mature institutional monitoring systems and mechanisms. The Planning and Quality Departments have directly contributed to the preparation of NDS-2 (2018-2022), giving them practical experience in planning. However, the modernization and development of public institutions is a long

journey that begins with laying the foundations for sound performance at the level of the eight focus areas (it was also one of the focus areas in NDS-1 2011-2016) and then incorporating the capacities and instilling the institutional values (which will be the focus of the NDS-2 2018-2022), towards achieving institutional excellence (Figure 2.1.4). These stages overlap positively, with each stage laying the foundations of the following stage to ensure smooth and systematic transition towards excellence.



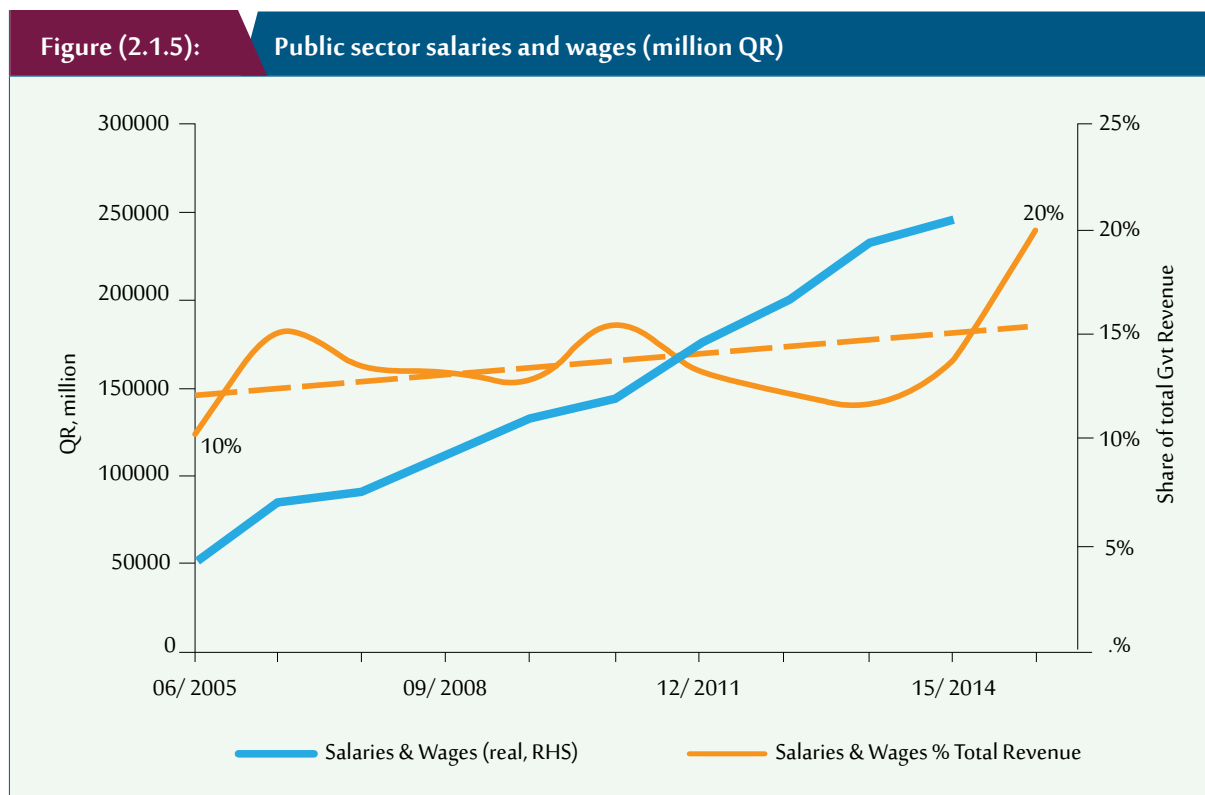
Source: Ministry of Development Planning and Statistics

Human resources management and capacity building in the public sector

Human resources constitute the purpose and means of development. They are particularly important in the field of institutional modernization and development as the government sector leads and finances the development process, and as performance management of human resources and capacity building are enablers of institutional development. Thus, special attention has been given to HR capacity-building and increased productivity, as specialized and HR standardized administrative units have been established in all government agencies. The promulgation of the Civil Human Resources Law No. 15 of 2016 was a positive step towards improving the performance management of the related entities. The law was supported by executive regulations specifying its implementation mechanisms. It should be noted that government agencies have been granted greater flexibility in managing their performance, particularly in developing their own assessment and incentive schemes³⁸, provided that the concerned government entity (ADLSA) undertakes the task of studying and monitoring the proposed rules and regulations at the macro level and ensuring their consistency and integration. The challenge, after completing the main legislative frameworks, is to activate and improve them and monitor their implementation, as well as to balance between the policies of rationalizing administrative expenses (Chapter I: salaries and wages) and the performance motivation policies, because strengthening the linkage between performance and incentive, salary and allowance systems as well as other benefits is a priority. The public sector institutions must also be developed to attract and retain required skills and to make the workplace a training and development environment.

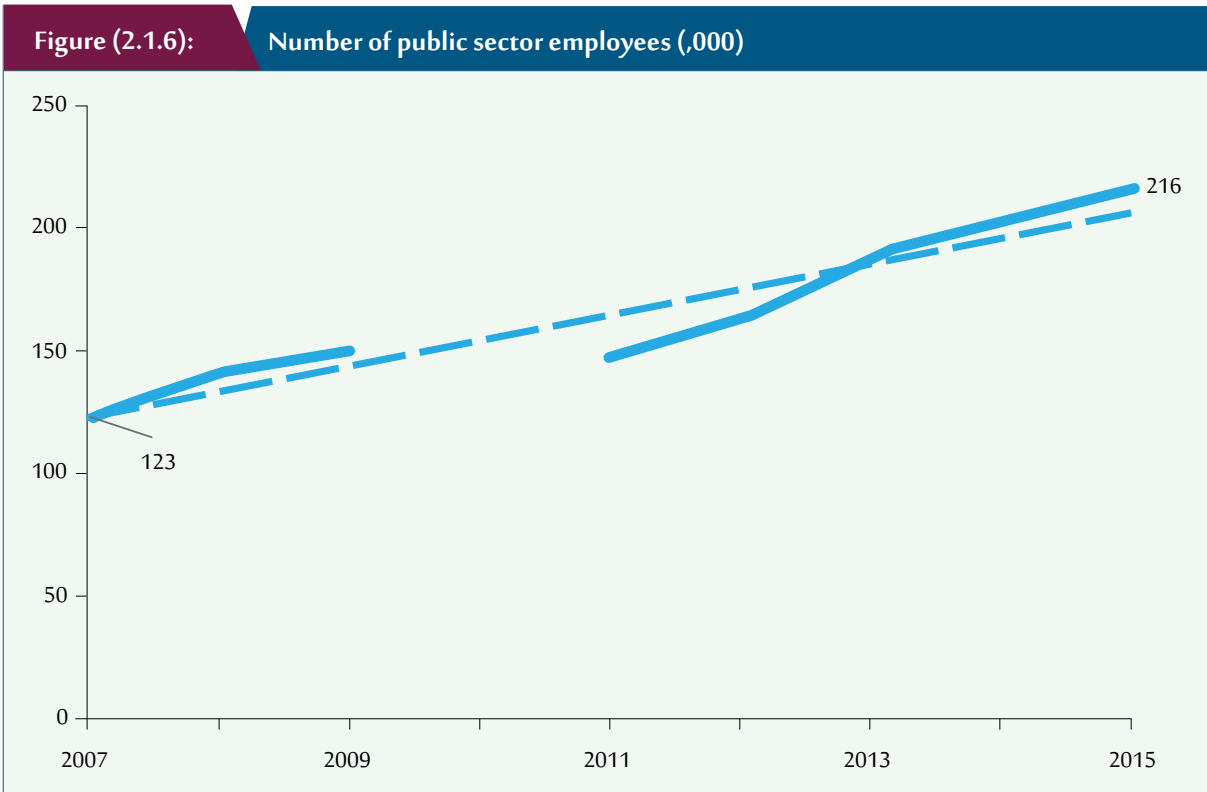
38 Article 34 of Civil Human Resources Law No. 15 of 2016

During the NDS-1 (2011-2016) implementation period, criteria were developed to recruit and place qualified Qataris. The salary, wage and benefit structures and policies were also reviewed and culminated in the promulgation of the above-mentioned Civil Human Resources Law leading to a review of the grade structure and allowances. Salaries and wages expenditure represented 20% of the total State's revenues in 2015 (Figure 2.1.5), which is equivalent to QR 36,777 million. The training track was linked to the career path based on employment needs, and promotion to a higher financial grade was also linked to a specific training package within the administrative track, in addition to a number of training hours in the specialized track, which was determined for each financial grade in line with the career development and the change in the professional career levels. A database was also created to support human resource planning. It includes data on qualified people and more comprehensive administrative data on government sector employees under the name of "government human resource database - Mawared".

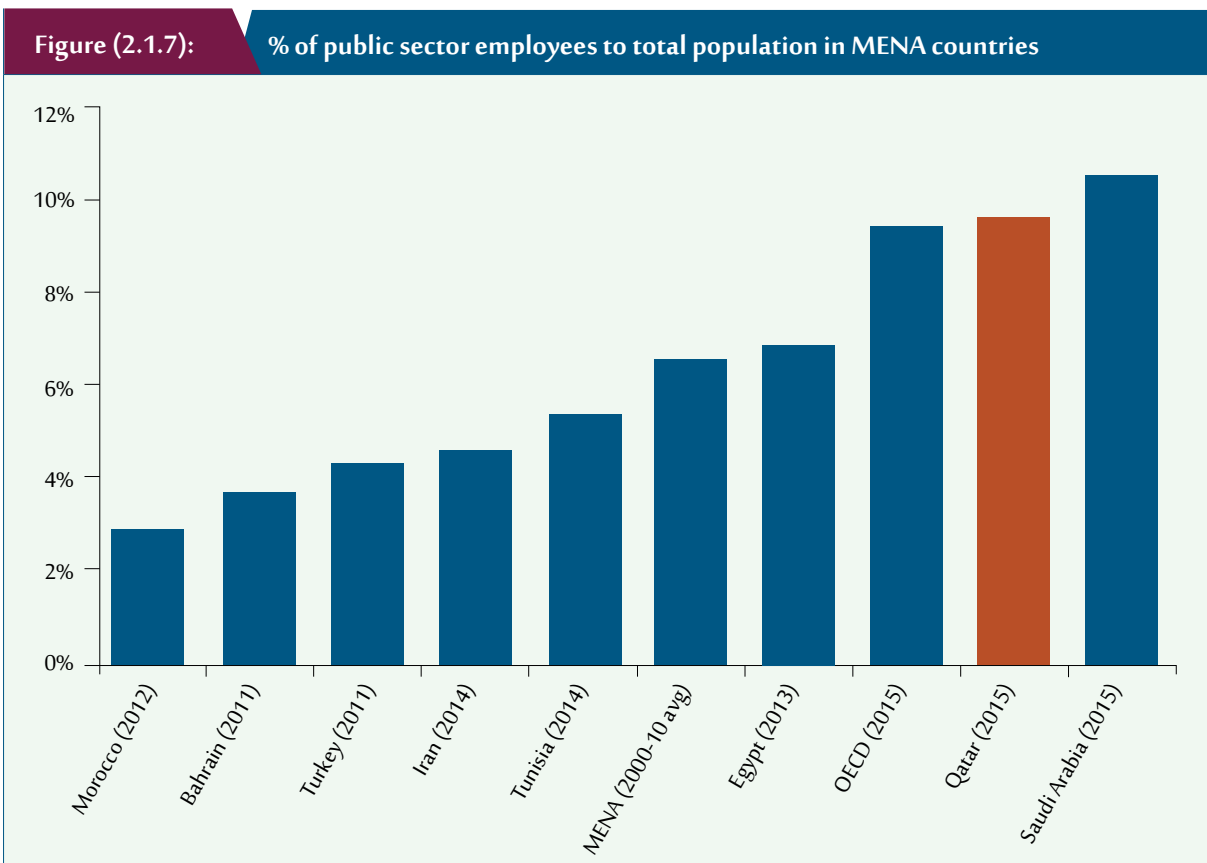


Source: World Bank, Qatar Ministry of Finance, MDPS Quarterly Statistical Bulletin

With regard to government capacity building programme, the new training agenda includes a more sophisticated training portfolio that responds to the actual needs of the sector. Training tracks and portfolios for the years (2014-2016) were determined according to the approved frameworks for training programmes in the administrative and specialized tracks. The IPA has conducted 1,760 special training programmes for government agencies and 100 training programmes for national executive leaderships. The government scholarship programme supports bridging the gap between HR supply and demand by focusing on the disciplines required by the sector. The 2016 scholarship plan targeted 2,062 students. However, there are still big challenges facing the sector in human capacity, particularly in ministries and government agencies with central functions. The NDS-1 mid-term review of May 2014 indicated that most of the projects faced challenges related to the lack of human resources specialized in project implementation. It should be noted that Qatar has one government employee for every 10 residents, and for every 8 adults. 10.8% of the total labour force were employed in the government sector in 2015. Although the ratio of public sector employees to total employees (12.2%) is lower than the average of the GCC and MENA countries (21.3%) (Figure 2.1.8), it accounts for 80% of the national labour force.



Source: Ministry of Development Planning and Statistics - Quarterly Statistical Bulletin (several issues)



Source: World Bank; MDPS Quarterly Statistical Bulletin 2015



Source: World Bank; MDPS Quarterly Statistical Bulletin 2013.

Management of government financial flows

Reviewing available options to ensure the flow stability of budget revenues and expenditures is one of the targets that have been addressed over the past years. In this context, financial flows between MOF and Qatar Petroleum were improved. A mechanism to transfer financial allocations to government units was also developed to achieve stability in financial flows, in addition to implementing a number of initiatives to rationalize government spending and increase non-oil revenues. Since the diversification of the tax base contributes to revenue stability, several related projects were implemented and pilot studies were conducted on VAT taxation in the GCC countries. The MOF launched an electronic tax collection system called the “Tax Management System” that provides a solid mechanism for tax collection and maintenance of tax records.

With regard to the finance sector development, in particular the use of a wide range of liquidity management tools, Qatar Central Bank managed the domestic liquidity until 2011 through Qatar Monetary Market Rate Mechanism, the requirements of banks’ mandatory cash reserves, issuance of certificates of deposit and the precautionary rules for bank lending activities. The government recognized the importance of effectively managing local liquidity to achieve comprehensive macroeconomic stability. In this regard, treasury bills were issued in 2011 with short-term maturity (91 days), followed by treasury bills of longer maturities (91 days, 182 days and 273 days). In March 2013, a new liquidity management instrument was added: quarterly issuance of government bonds with maturity of three and five years. The maturity of government bonds issued in 2014 was extended to seven years and those issued in 2015 to 10 years. Now, the government bonds and bills are listed on Qatar Exchange after the Qatar Financial Markets Authority (QFMA) issued the rules for offering and listing sukuk and bonds to regulate their trading among investors. Given the QCB and QFMA roles in achieving financial stability, the Financial Stability and Risk Control Committee was established in 2013 with the membership of the supervisory bodies overseeing

the financial sector. In the same year, the central activities of settlement, clearing, depositing and registering securities were separated from the market activities at Qatar Exchange by the establishment of Qatar Central Securities Depository, which became operational in early 2014 after the issuance of rules of licensing and regulation of depository. Two liquidity ratios were also introduced in 2014: the first was the liquidity coverage ratio (LCR), which was designed to protect banks against short-term liquidity risks; and the second was the net stable funding ratio (NSFR), which fulfills the banks' liquidity management needs in the long run.

As for the preparation of a national strategy that will guide the development of the domestic capital market, it was adopted by QFMA in 2013. It has nine objectives: (1) promotion to modern financial markets in cooperation with Qatar Central Bank; (2) improving market access for investment companies and products; (3) establishing an effective market monitoring and supervision system; (4) developing and implementing an efficient system to provide capital market services; (5) facilitating capital formation in primary and secondary markets in cooperation with Qatar Central Bank; (6) enhancing the competitiveness of Qatar's financial markets; (7) improving international cooperation; (8) promoting financial education for investors; (9) transformation into a modern international financial market regulator.

In this context, QFMA enacted an integrated package of capital market legislation and issued regulations to support the listing of new products, such as underwriting rights, bonds, treasury bills, sukuk and investment funds, e.g. Exchange-Traded Funds (ETFs) and Real Estate Investment Trusts (REITs). Moreover, QFC companies³⁹ as well as SMEs have been listed, and thus, specialized markets complementing the main market have been set up to accommodate these products (emerging SME market, a bond and sukuk market, a market for listing QFC companies, and investment fund market). The market infrastructure was also strengthened and more services were licensed to facilitate the expansion of the investor base domestically and internationally. Efforts have culminated in the assertion of Qatari market merit and the upgrading of Qatar Stock Exchange from frontier market to emerging market.

Managing the budgeting process

With regard to developing the system for state budget preparation, implementation and control and for the management of financial resources, the budgeting processes were automated in 2016 by virtue of State Budget Declaration of 2017 issued by the Ministry of Finance. However, until fully completing the transition processes towards the application of the functional classification of expenditures, the link between budget and plans will remain loose. As for establishing a system to reduce the share of administrative expenditures from the total ministries/agencies' expenditure, the MoF has set fiscal ceilings for current expenditures (Chapter II) and capital expenditures (Chapter III) for the next three years 2016-2018.

Public procurement management

In order to improve the Public Procurement and Tender Law, develop its executive regulations and link ministries and government agencies' performance with procurement, the Government Procurement Law No. 24 of 2015 promulgating the Tenders and Bids Regulatory Law was issued and entered into force on 3 June 2016. Its Executive Regulations were also issued by Law No. 22 of 2016. The Government Procurement Organization Dept. in MoF organized the work of tenders and bids committees in government agencies through the establishment of 54 government committees, and building a communication network with representatives of government agencies to enhance cooperation and speed up communication. A number of circulars regulating the work of tenders and bids committees were issued, and a unified template was set up to advertise tenders and bids in newspapers, which includes all advertising items mandatory by law. The contractor's classification criteria were also updated, and classification criteria were established for suppliers and service providers.

³⁹ Pursuant to Law No. 7 of 2005 promulgating Qatar Financial Center Law, QFC may establish companies and entities to carry out its activities and may grant licenses to companies to carry out their activities in or through QFC.

A joint e-system for government procurement was also launched in 2016 under the name of “Government Procurement Portal”. It is the official channel of interaction between all government agency buyers, and companies and institutions with full transparency, where they are evaluated and categorized according to their specialization. The portal has automated the registration and classification of companies, suppliers and contractors. It also provides access to existing government tenders and possibility to search for active tenders. The Government Procurement Department also issued the portal’s user guide and government specialists were authorized to use the e-system by providing them with “user names and passwords”. Finally, a number of training courses and workshops were organized to train government specialists on how to use the portal.

Aligning public expenditure with national development goals

Over the last six years, serious steps have been taken toward budgetary reforms, in particular achieving the goal of setting an ambitious balanced budget linked to NDS-1 (2011-2016) and to the executive plans of spending entities. Thus, Law No. 2 of 2015 promulgating the State’s financial system was enacted to serve as a general framework for the development of government financial performance. It further drew the legislative framework for the fiscal policy and for the implementation of international public finance management standards, which will help identify the priorities of economic development projects. By virtue of this law, the Gregorian calendar was adopted as the fiscal year, where the 12-month period will start on 1 January and ends on 31 December of the same year. Moreover, the State budget for the fiscal year 2014-2015 was extended to the end of December 2015 as a transitional measure.. The public finance functions were also established by creating a new specialized administrative unit called (Fiscal Policy Department) to develop the overall fiscal policy, conduct policy analyses and prepare and develop financial statistics. A three-year medium-term financial framework was developed, and is reviewed annually and used to guide the State budgeting process and rationalize expenditure as it includes expenditure ceilings at the level of Chapter II and Chapter III. MoF also classified the State budget according to an updated classification of functions which is consistent with the UN Classification of the Functions of Government 1999 (COFOG) and with the IMF’s Government Finance Statistics Manual 2014 (GFSM), while providing training on GFSM for government agencies. As part of launching Phase I of the Government Financial Information Management System (GFMS), the budgeting processes were automated and a transitional technology structure was set up to receive line-item budget estimates from government agencies to match the expenditure items by functions.

Box (2.1.2): Qatar’s Medium-term Fiscal Framework

The fiscal framework is a tool that supports the implementation of fiscal policies. After issuing the State’s financial system in 2015, MoF developed a 3-year forward-looking financial framework (2017-2019), which includes overall estimates of state revenues and expenditures. The estimates are based on a macroeconomic forecasting model, and are revised and updated on annual basis. This framework is used to develop the country’s fiscal policies. It has promoted the government’s central financial functions from just allocation of funds to broader functions guiding expenditure towards national development priorities, while fulfilling the value-for-cost and financial sustainability principles.

Improving the quality of capital assets and effectively meeting the development needs of State resources means practically that the decisions on the size and allocation of the state capital budget (Chapter IV) will be guided by a realistic assessment of strategic priorities and an accurate analysis of the best investments for Qatar’s long-term growth and development. In order to improve the quality of financial assets, the private sector should be engaged in public investment projects, but within a solid framework that provides development benefits to the state, including knowledge and skill transfer. However, while progress was made in the period 2011-2016 towards improving the management of public investments, the complex nature of the

programmes as well as the required cooperation and coordination among stakeholders, would make achieving the goals only possible in the long run. In his speech before the Shura Council in November 2013, His Highness the Emir pointed out that

“...Mismanagement that leads to frequent changes in project specifications at the State’s expense, or in delaying or stalling their implementation, and then hastily implementing them under worse conditions would increase the costs.”

With regard to realizing the target of developing a public investment programme where all key decisions are taken based on systematic benefit-cost assessment against the national development priorities, initial steps were taken, including the creation of a specialized administrative unit by virtue of the Council of Minister’s Decision in 2015, called (Department of Public Enterprise Organization), to manage the government investment agenda at all stages. The institutional rules of its operations were also set up during the past period. An M&E mechanism for the State’s major projects was developed on the basis of systematic benefit-cost assessment against the national development priorities. The Ministerial Group for Coordination and Follow-up of Major Projects (of strategic importance), established by Prime Minister’s Decision No. 1 of 2015, reviews the costs of major projects, proposes financing methods/tools and follows up on implementation once approved. As for engaging the private sector in public investment projects within a solid framework that provides development benefits to the State, including knowledge and skill transfer, a committee led by the Ministry of Economy and Trade (Technical Committee to Motivate and Engage the Private Sector in Economic Development Projects) was created to encourage public-private partnerships. The committee encourages private sector participation in economic development projects, including the proposal of PPP projects, means to support the private sector and the related policies, standards and regulations. It also proposes and supervises the implementation of land allocation policies as well as project tendering and bidding policies, as well as the work of the Ministerial Group for the Encouragement and Participation of the Private Sector in the Economic Development Projects , which was established by the Council of Minister’s Decision No. 14 of 2016. In addition, 5 PPP projects were implemented, including the launch of a land allocation project for the private sector to develop and operate hospitals, schools and tourist facilities. A draft PPP law and strategy are expected to be issued during the NDS-2 period (2018-2022).

3. Challenges facing institutional development, service delivery and fiscal management

Challenges facing public sectors seem to be almost the same in most countries, with varying degrees. They usually include the large or oversized public sector on one hand, and the unsustainable growth of government spending on the other. The employees’ financial benefits offered by the public sector are often greater than those in the private sector, with poor correlation between benefit levels and employee’s productivity. Also, the government employee’s skills and qualifications often do not match job requirements, in addition to the lack of certain specializations required by the sector, and inefficient or immature performance monitoring systems, leading to poor accountability and implementation. Factors affecting the productivity of government employees include low motivation, low quality of outputs, weak communication, uneven distribution of workloads among staff, modest job descriptions, and poor monitoring of the implementation of performancesystems.⁴⁰

Institutionalization of civil service delivery

Rapid development increases pressure on public service agencies because of the growing requirements of development projects and the steady increase in public service beneficiaries. In Qatar, the implementation of the many NDS-1 projects

⁴⁰ Source: World Bank. Improving the public-sector performance: challenges facing the reform of civil service systems in MENA countries, Nov 2016.

which were extended into NDS-2, and the major projects related to FIFA 2022, as well as the large population increases require the provision of efficient and responsive public services. This generates a growing need for the development and organization of public service agencies to be efficient and capable of meeting the increasing demands for services and ensure consistent performance through introducing the latest service delivery technologies. There is also a growing need for greater private sector participation in supporting development and service delivery, as well as the need to attract foreign investment and create an attractive business and investment environment. Government spending should also be rationalized and administrative jobs reduced, and more focus should be given to front organizational units in providing key services. A central database of public sector bodies and institutions should be built to increase coordination and cooperation among them, and strengthen the principles of control, responsibility and accountability for performance.

Box (2.1.3): General framework for building modern public institutions and providing distinctive services

Organization	Policies and planning	Human resources	Financial resources
Defining general mandate	Resource-based planning	Job descriptions	Performance-related budgeting
Mandate structure	Development of work policies and procedures	Organization of performance management	Identified government priorities
Organizational Structure	Job Structure	HR Structure	Specific programmes and plans
Determine service delivery	Fee determination	Standard-related performance	Determine Measurement indicators
Determine service delivery model	Determine procedures	Continuous training	Activate the monitoring role
Evaluate institutional performance	Set standards for outcome measurement	Output measurement	Output measurement

Source: Ministry of Development Planning and Statistics.

Strengthening central functions and enhancing general performance

The goal of strengthening central functions (government-to-government services) and developing public performance is to gain and accumulate institutional knowledge, and make it part of the overall institutional heritage and behavior of government agencies. His Highness the Emir highlighted this in his speech at the opening of the 42nd Session of the Shura Council on 5 November, 2013, when he pointed out that “Plans are not a matter of completing a formality; they are developed to be implemented. Hence, they need to be carefully designed and implementable within the resources including available funding. Our institutions should respect the set plan and be accountable against its objectives.” Once institutions get accustomed to planning and working according to established methodologies, the culture of planning, work and achievement will be instilled. Achieving this requires career stability for public employees to ensure experience accumulation and knowledge transfer. It also requires effective monitoring and reporting mechanisms to track barriers and accountability mechanisms to support strengths and reduce weaknesses.

There is an urgent need for a strategic approach to labour force planning, talent management and capacity building in ministries and government agencies. With ADLSA’s technical support, human resources and capacity building plans should

be in line with the strategic priorities of these government agencies and be an important component of their strategic plans, taking into account the State's willingness to reduce reliance on expatriate skills in the public sector without affecting its performance, and to apply merit-based recruitment, along with highly skilled and efficient training strategies. In order to achieve faster progress in addressing the above challenges, it is necessary to:

- Prioritize capacity building in ministries and government agencies mandated with central functions, such as MDPS, ADLSA (Administrative Development Sector), MoF and Ministry of Transport and Communications (Telecommunications Sector), which will help roll out these capabilities and experiences gradually and sequentially to the remaining ministries and agencies.
- Strengthen and empower planning and quality departments in ministries and government agencies, provide them with priority support to build the capacity of their staff who must be recruited and employed according to high professional standards and must be retained to avoid turnover.
- Strengthen and empower HR departments at ministries and government agencies, provide them with qualified staff, and get them to follow strategic approach in HR planning and talent management and to use solid and efficient systems in important areas, including job Qatarization plans based on quality rather than quantity and staff development based on job succession planning.
- Develop innovative approaches and systems to support and accelerate the building of national capacities at ministries and government agencies in strategic planning, project management and other areas related to NDS implementation, and systematically use the available training and development capabilities of the country's universities and educational and training institutions.

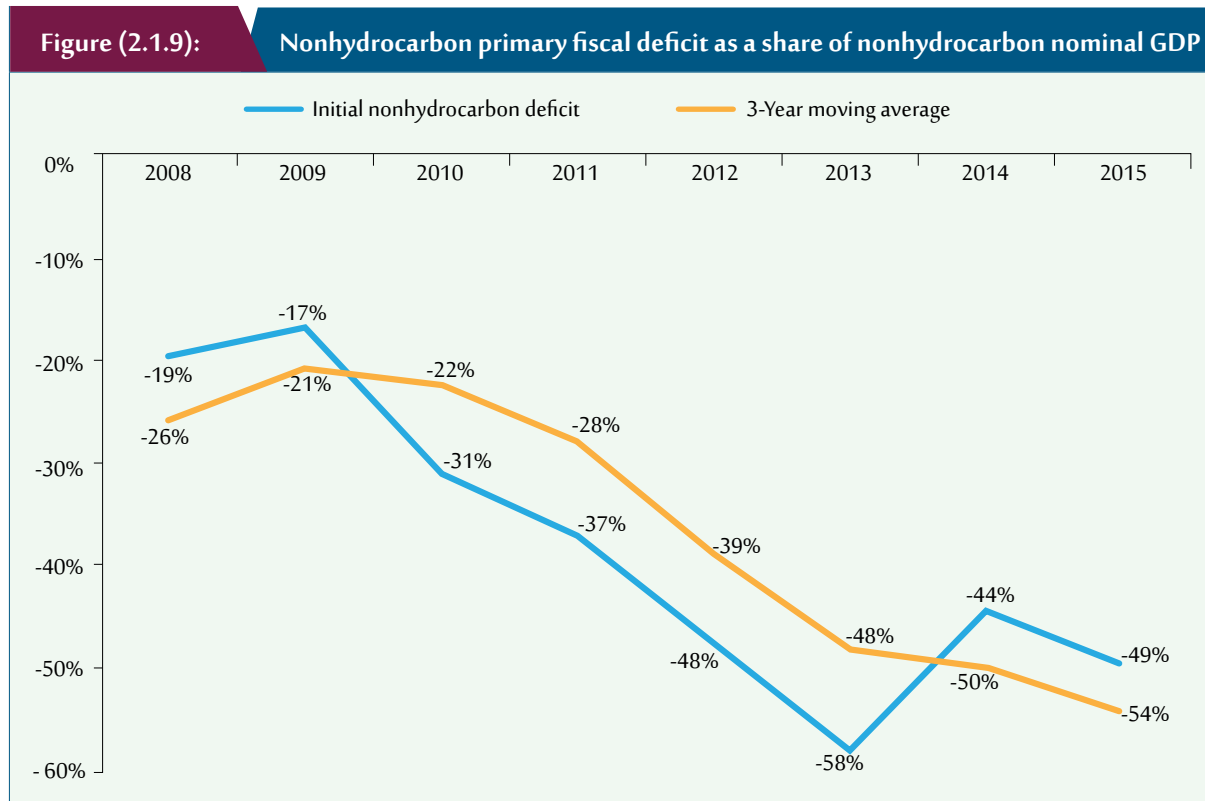
Fiscal Management and Budgeting

The economies of resource-rich countries, such as Qatar's hydrocarbon-based economy, face particular challenges in that the State's revenues depend heavily on the prices prevailing in the global energy markets. Price volatility means fluctuation of revenues, as the hydrocarbon sector is a major source of Qatar's revenues (82.4%)⁴¹ and the key development engine. This has been evident in recent years with very volatile oil prices. Price volatility during the last two years of NDS-1 (2011-2016) was sharper than before, both in levels and in frequency. In 2015, oil prices dropped by 74% lower than the average of the period (2009-2014). This sharp decline was accompanied by similar drop in LNG prices, albeit at a lower rate. Meanwhile, the challenge is not just that these natural resources are vulnerable to price fluctuations, but that they are also depletable. This price collapse coincided with two important developments with prolonged impact in the future, which makes this challenge chronic. The first was the technological advancement that enabled the economically feasible extraction of shale oil and gas; thus, continued advancement would further lower production costs and increase oil and gas reserves. This low cost will then be a ceiling for future prices of oil and gas. The second development is the inflation in the budgets of oil and gas exporting countries, including the increase in Qatar's government spending (consumption and investment) to meet the development requirements, against decreasing or fluctuating revenues. This raised the risk of the State budget deficit and increased public debt. The first signs appeared when the State budget in 2016 recorded an actual deficit of QR 49,858 billion⁴².

41 Qatar Central Bank, 40th Annual report, 2016.

42 Ibid..

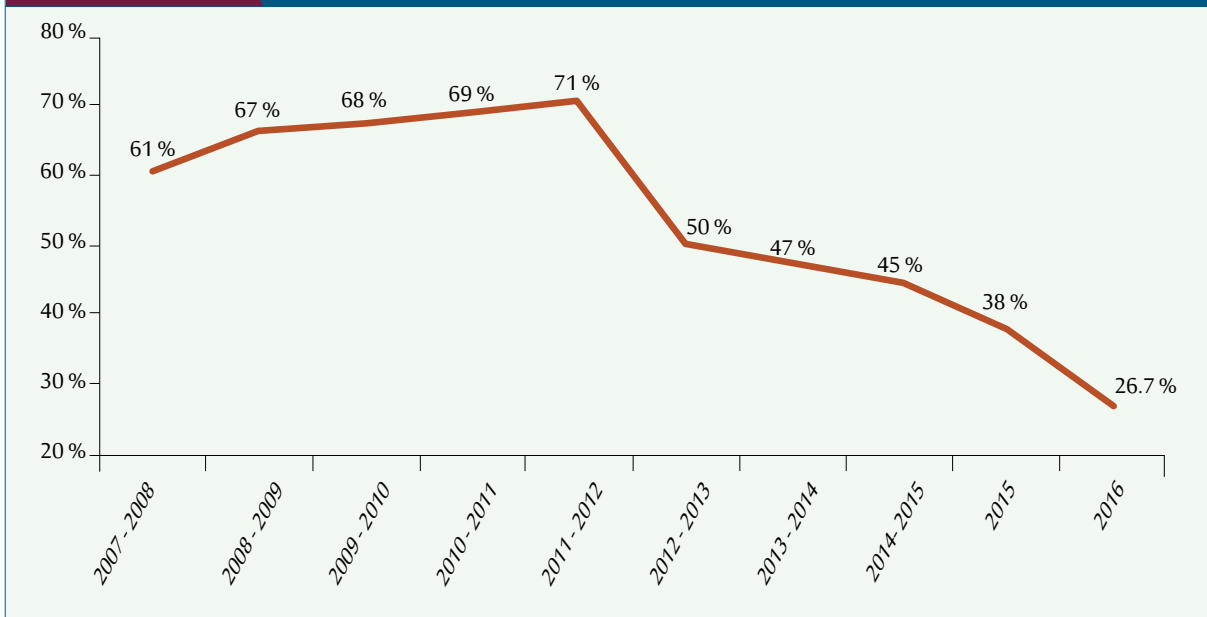
Therefore, financial and economic stability and mitigating the impact of global energy market fluctuations on State revenues must be a priority. This can be achieved through diversifying and expanding non-hydrocarbon sources of government revenues by raising the efficiency and amounts of collected taxes and introducing the VAT, in addition to reviewing the fees of government services with the highest return during the first half of NDS-2 (2018-2022), and the continued revision of government subsidies for goods and services to reflect their economic cost. These efforts, in addition to economic diversification initiatives in other sectors, are expected to reduce the nonhydrocarbon primary fiscal deficit as a share of nonhydrocarbon nominal GDP; an indicator used to determine “sustainable” spending levels, because it reflects the net inflow of government spending on domestic economic activities and financing needs through oil and gas revenues (Figure 2.1.9).



Source: Ministry of Finance, Qatar.

With regard to government spending, measures to curb government spending in 2015 and 2016 were not sufficient alone to achieve financial sustainability. They must be accompanied by measures to increase the efficiency of the use of financial resources and maximize their returns. The ratio of current government expenditure to total expenditure since the fiscal year 2007/2008 has taken an upward trend, despite a slight decline in the year 2013/2014, which is high compared with other countries (Figure 2.1.10). As MoF moves ahead with the implementation and use of the medium-term financial framework as a tool to implement the country’s fiscal policy, it is expected to see a break in this trend and a decline from the high levels, which already occurred in 2016 when this ratio dropped to 26.6% of total expenditure.

Figure (2.1.10): Current expenditure to total government expenditure

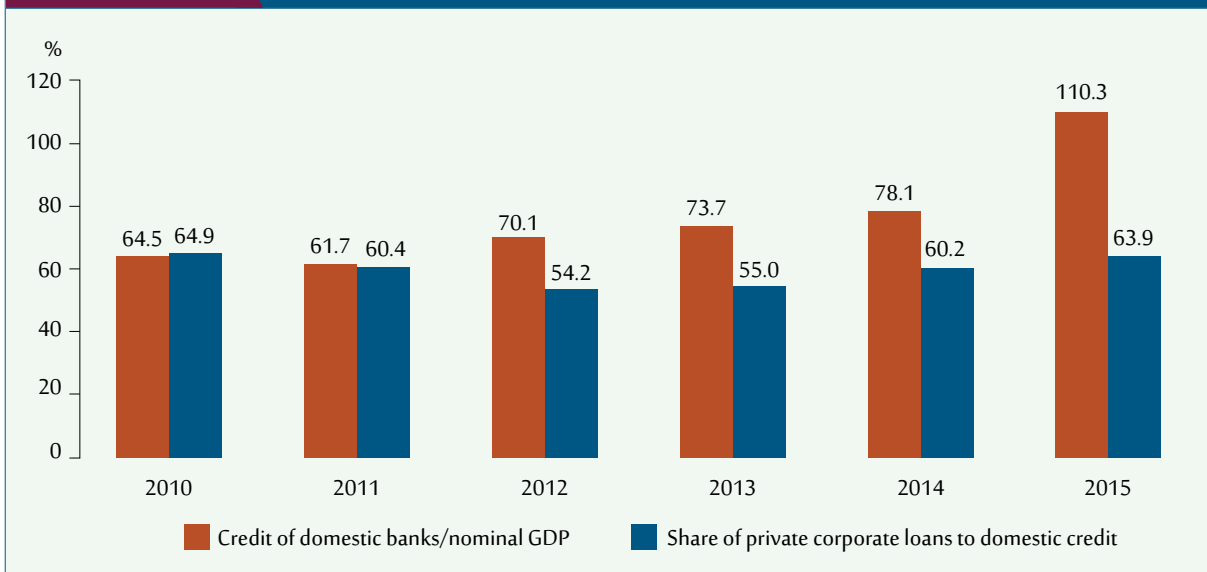


Source: Qatar Central Bank, Annual report 2016.

Note: the 2015 figures cover 9 months only (1 April to 31 December) due to the extension made pursuant to Law 2 of 2015 changing the fiscal year to the calendar year.

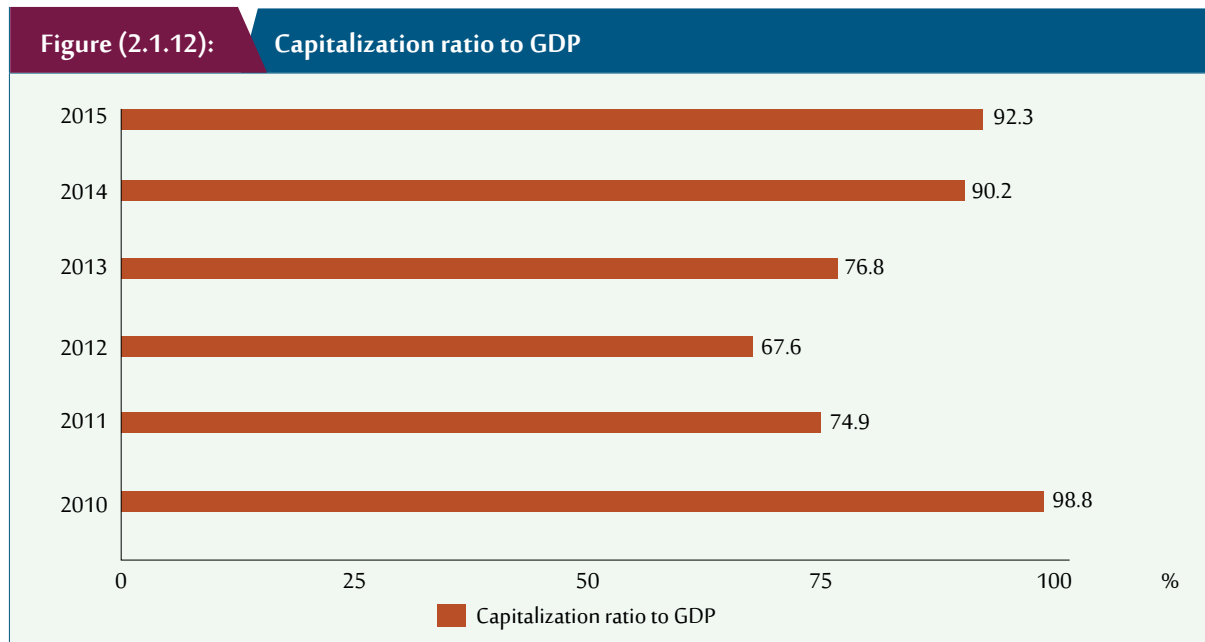
The banking system is a key element in achieving financial and economic stability through its growing role as a financing intermediary that transfers funds from savers to borrowers. Given the domestic credit of banks as a share of nominal GDP, and at the same time the share of lending to private companies from domestic credit, the banking system shows sound performance with the credit markets continuing to grow as well as the banking system growing role as a financial intermediary (Figure 2.1.11). Non-bank financial intermediaries, including insurance companies, Qatar Development Bank, financiers, investment companies and exchange firms, have also played a growing role in economic diversification, especially the insurance sector. As the financial sector continues to grow, non-bank financial institutions are expected to play a greater role.

Figure (2.1.11): Bank domestic credit as share of nominal GDP and share of private corporate loans to domestic credit



Source: Qatar Central Bank

Qatar Stock Exchange indicators reflect the market size through the market cap index as a share of GDP. The average of this index in high-income countries was 65%, and in Qatar it was 92.3% in 2015. Thus, the local market size is commensurate with Qatar economy size (Figure 2.1.12).



Source: Qatar Central Bank

4. Main and intermediate outcomes and targets of institutional development, service delivery and fiscal management (2018-2022)

Main outcome:

“Modern public-sector institutions that provide excellent services and achieve financial sustainability”. To realize this outcome, a set of intermediate outcomes and targets have been identified as follows:

Intermediate outcome 1: Consistent and resilient government organization that responds to development requirements

The government will continue adapting its organizational structures to facilitate its tasks and functions, fulfill the development and modernization requirements and lead the public institutions to institutional excellence. The regulation system will continue to be completed through adapting functional structures with the new organizational structures and linking them to job categories based on the grade structure created under the Civil Human Resources Law No. 15 of 2016. The “Public Job Description and Classification Manual” currently being developed will provide a reference for all ministries and government agencies. The budget system in Chapter I will also be developed to support budget control, follow-up and monitoring processes. This will be further supported by linkage with the MoF Accounting Department, which was activated in 2015.

- **Target 1:** Ensure clear operational and organizational roles and responsibilities in different ministries and government agencies - ongoing target (end of term).

- **Target 2:** By 2018, update the job description, categorization and classification in all ministries and government agencies in accordance with the Civil Human Resources Law No. 15 of 2016.
- **Target 3:** By 2018, develop a system that supports the control, follow-up and monitoring of the budget of Chapter I.

Intermediate outcome 2: Efficient and Effective Government Performance

By the end of 2016, ADLSA started implementing the institutional performance standards which will be completed in the coming period, according to a clear timeline. These efforts will be integrated into a comprehensive government performance M&E system. An independent evaluation of government performance in the State of Qatar will also be conducted to guide the development of this system, as well as benchmarking Qatar with other countries and best practices in this regard. MDPS will focus on linking ministries and government agencies performance with strategic plans and budgets, not only through enhancing monitoring processes and their content, but also through analyzing the challenges and obstacles to NDS implementation.

- **Target 1:** Develop an overall government performance monitoring system by 2019
- **Target 2:** Link the performance of ministries and government agencies to strategic plans and budgets by 2018.

Intermediate outcome 3: Improved institutional processes that enable government entities to provide distinctive services

Further improvement in the institutional processes and service delivery will be achieved through the expansion and development of service complexes to provide all services through one-stop shop, enabling the public to obtain timely and distinctive services in one place through qualified staff and advanced technologies. In addition, self-service centers in public places will be developed to enable users to access government services independently around the clock, without even going to service complexes. There will be focus on building an integrated system of institutional processes to achieve excellence in service delivery, through streamlining procedures and issuing manuals, as well as developing and institutionalizing comprehensive surveys on government services as a key tool for evaluating the efficiency and effectiveness of government services, taking into account all beneficiary categories.

- **Target 1:** Enable all citizens and customers to access various public services online by using a single user definition by 2020.
- **Target 2:** Provide coordinated and automated service delivery channels to facilitate cooperation and coordination among government entities by 2020.
- **Target 3:** Build an integrated system of institutional processes to achieve excellence in service delivery by 2019.
- **Target 4:** Improve the service delivery efficiency in a competitive climate (ongoing target: end of term).
- **Target 5:** Institutionalize the processes of measuring the efficiency of public services by 2019.

Intermediate outcome 4: Effective IT utilization in public service delivery

With the continued priority of improving and increasing the use of IT in public service delivery, the focus will be on the implementation of a fully-digitized e-government in Qatar by 2020. The second phase of the project already started in early 2017, and will last for two years. It aims to develop a data sharing platform to meet more complex needs, set global best

practice standards for data definition and data sharing governance, launch 10 new data packages and connect 20 beneficiary entities. The development of the joint government technology infrastructure will also be completed and all government agencies will be connected by the end of 2018. Furthermore, common services will be developed, such as the second version of the ePay portal, the plan of developing the Government Call Center and government network, ensuring sustainable non-disrupted service delivery And finally raising the government network readiness to address cyber threats.

- **Target 1:** Full activation of the data e-management system and implementation of integrated e-services by the end of 2020.
- **Target 2:** Adopt common government infrastructure by all government entities and link them under the umbrella of Qatar Digital Government Programme by the end of 2018.

Intermediate outcome 5: Ministries and government agencies' strategic planning that focuses on outcomes and outputs

In the coming period, focus will be on creating an appropriate legislative environment for the development of a strategic planning system through rationing its components, and in particular enacting a law specifying the steps to development, approval and implementation, of NDSs, operational plans and reporting mechanisms, as well as adjusting the track and removing implementation barriers. Follow-up is key to ensure successful implementation of development strategies. Thus, focus will be on enhancing the monitoring and follow-up methodology implemented during NDS-1 (2011-2016) and on establishing an integrated monitoring system to stabilize progress towards high-level development outcomes. In addition, integrated technical and advisory services will be established to support the planning process in government agencies and to fill the planning gaps gradually. This requires studies and assessments of the existing technical support service package, its scope and effectiveness.

- **Target 1:** Establish and institutionalize a planning, advisory technical support service system to enable government entities develop strategic plans to implement the national development strategies in line with QNV 2030, by 2020.
- **Target 2:** Enact a legislation specifying the steps to NDS development, approval and implementation, together with operational plans and reporting mechanisms; adjust the track and remove implementation barriers by the end of 2018.
- **Target 3:** Develop a system to monitor and follow up the realization of development strategies by the end of 2019 .

Intermediate outcome 6: Efficient management and outstanding performance of government human resources

Given the fact that HR database covers 38 government entities and 41,504 out of 216,000 government employees), the coming focus will be on completing the development of this database and extending it to cover all government entities/ staff, and also on developing an operation/management mechanism for jobseekers' database to identify and address any gaps in the skills supply and demand and address the redundancy. A comprehensive national HR strategy will be developed to cover all workers in the public and private sectors. Within this context, another strategy will be formulated to hire talents and address their recruitment barriers. In addition, following the establishment of the government training system and the achievement of a remarkable progress over the past years in terms of linking between training and career paths, this process will be complemented by the formulation of a comprehensive national training and qualification strategy based on objective and scientific assessment of the State's actual training needs and is related to the employee's tasks and work. The training programme will be aligned with the requirements of the Civil Human Resources Law No. 15 of 2016. Capacity development in the HR departments at ministries and government agencies will be given particular focus, given the key role of these

departments in selecting and building the capacity of government staff and developing performance management systems to promote their creativity and yield.

- **Target 1:** Identify and address the existing gaps between supply and demand for talents and manage the employment surplus/deficit by 2019.
- **Target 2:** Increase the recruitment and employment of talents to build a modern public administration by 2019.
- **Target 3:** Develop and implement a strategic plan for the government human resources to ensure the development of human capacities in the public sector by end of 2019.
- **Target 4:** Provide a training tailored to the State's needs and career development goals for public sector employees - ongoing target (end of term).
- **Target 5:** Review the link between training and career paths in light of the findings of the government training programme evaluation and the Civil Human Resources Law 15 of 2016, by 2019.

Intermediate outcome 7: Stable revenues of the State

A more comprehensive and coherent approach will be applied to consider options for stabilizing revenue and expenditure flows during the period 2018-2022 and reducing the impact of global energy market fluctuations on the State revenues. Therefore, the focus in the coming period will be on increasing the government transfer revenues (fees and taxes) and on raising the efficiency of tax administration by activating the use of the newly established electronic Tax Administration System (TAS) and its operating rate is expected to reach 60% by the end of 2017 and will be fully operational by the end of the period. It is also planned to apply VAT, now that it has been studied by the GCC countries, and it will be managed and collected through an integrated electronic system. Government service fees will be reviewed for the 10 entities with the highest fees, followed by the remaining entities. This will enhance the government revenues and will contribute to economic stability. Efforts will continue to revisit government subsidies for goods and services to reflect their economic cost.

- **Target 1:** Diversification of non-oil revenues - ongoing target (end of term).
- **Target 2:** Mitigating the impact of oil price fluctuations on the State revenues by the end of 2018.

Intermediate outcome 8: Optimal utilization of financial resources and public expenditures in line with the State's strategic plans

After addressing the budgeting issues over the past six years, focus in the coming phase will be on budget management and implementation, which already began in March 2017, in five entities: MoF, ADLSA, MoTC, MoJ, and Ashghal. MoF will implement the sector budgeting system, allocating a budget for each sector, starting with the sport and culture sector. Focus will also be on the development of financial reporting and the provision of financial statistics in accordance with the Special Data Dissemination Standard (SDDS) and in coordination with MDPS. Emphasis will also be placed on implementing a system for public project management, as well as a performance management system to be linked to related systems, such as the tax system. The focus will further be on reducing the share of current administrative expenditures from total expenditures of ministries and government agencies in particular.

- **Target 1:** Develop a system for preparing, implementing and monitoring the State budget and for the management of financial resources by 2020.
- **Target 2:** Establish a system for reducing the share of current administrative expenditures from total expenditures of ministries and government agencies by 2018.

Intermediate outcome 9: Effective management of government procurement

The development of the government procurement portal will be completed and its various services will be activated, which will include receiving e-mail alerts on new tenders, as well as obtaining tender documents and submitting offers online. Services to be added in light of the new government procurement law will be considered. Mechanisms for using the government procurement portal are currently being developed by providing mobile application. The contractors' performance appraisal programme will be updated to include both suppliers and service providers to ensure that companies are able to efficiently fulfill their contractual obligations. In addition, unified forms of government service contracts will be developed to overcome the problems resulting from the current contracts, ensure efficiency and effectiveness of these contracts and achieve more savings for the State. The e-purchasing card will also be introduced to facilitate the purchase of daily operating requirements in government agencies and to address petty cash-related issues. Emphasis will be placed on the implementation of the Tenders and Bids Law and its executive regulations.

- **Target 1:** Full activation of the Tenders and Bids Law and its executive regulations by the end of 2018.
- **Target 2:** Link the performance of ministries and government agencies to government procurement portal by 2018.

Intermediate outcome 10: Proper fiscal policies that maintain economic stability and prosperity

Public finance reforms are complex and involve structural programmes that require cooperation at all government levels. The budget reform process will continue to be gradually and accurately adjusted in accordance with the changing circumstances, lessons learned and the pace of capacity building and development. The government financial rating system, developed during NDS-1 has been completed and the government financial system "Maliyah" was launched in 2017. The electronic Tax Administration System (TAS) will take effect once it is launched. Finally, greater attention will be given to public debt management functions and the development of a medium-term public debt strategy.

Now that the objective of developing local liquidity management tools has been realized, Qatar Central Bank will aim to improve its liquidity management framework through several actions: (i) improve its capital flow monitoring and assessment capabilities and support commercial banks' efforts to study liquidity trends on the longer term and to participate in secondary market activities; (ii) improve liquidity management by the banks themselves, taking into account the developments in domestic and global financial markets, and improve treasury management; (iii) early announcement of treasury bills and bonds issuance schedule, which would have a positive impact on trading and price forecasts; (iv) Finally, for the purpose of full transition to liquidity management through the market, the Repo rate will be used as a liquidity management tool, which requires high coordination between fiscal policy and monetary policy. QCB will also make appropriate adjustments to the operational procedures of its monetary policies to facilitate enhanced liquidity management. With regard to the development of the domestic capital market, the QFMA will continue to improve the efficiency and quality of the performance of financial service companies and develop and improve financial services and products delivered to investors by increasingly relying on modern technologies, improving market information security, and reducing risk, while continuing to support cooperation initiatives with international organizations and institutions, and developing human capital.

- **Target 1:** Maintain the State's high credit rating - ongoing target (end of term).
- **Target 2:** Improve the quality and transparency of financial data by 2022.
- **Target 3:** Strengthen the State's financial reserves and efficiently manage public debt by the end of 2018.
- **Target 4:** Effective coordination and integration between the fiscal policy and monetary policy- ongoing target (end of term).

Intermediate outcome 11: Effective management of the State projects and quality capital assets

After the establishment of a specialized administrative unit to regulate public investments and manage the public investment programme, and after setting criteria for evaluating and implementing the investment project proposals, the focus in the coming years will be on finalizing the components of the public investment programme, especially coordinating and synchronizing the capital expenditure decisions with the medium-term budget framework and the annual budget cycle, in addition to monitoring spending on large-scale projects and identifying potential financial risks and introducing a simplified system for examining, selecting, prioritizing and monitoring the public investments, to enhance coordination among them and avoid bottlenecks. As for private sector involvement, a policy framework will be created to regulate PPPs, including the necessary institutional arrangements to enable the private sector to participate in public investments, taking into account the implementation of the larger PPP framework.

- **Target 1:** Complete the implementation of major development projects in infrastructure, healthcare and education as well as FIFA related projects by 2021.
- **Target 2:** Enable the private sector to participate in public investment projects within a solid framework that ensures the achievement of the State's development outcomes, including knowledge/skill transfer, by 2020.

5. Conclusion:

The review and evaluation of NDS-1 (2011-2016) performance has led to identifying the future development trends. In this context, most of the intermediate sectoral outcomes have been maintained after some of them have been reformulated. Implementation will cover the period 2018-2022 and most of the specified targets will be reviewed and adapted to the future development requirements.

6. Annex:

Intermediate outcomes, targets, projects, and implementing agencies that contribute to achieve the main outcome: “Modern public-sector institutions that provide excellent services and achieve financial sustainability.”

Intermediate Outcome	National targets	Projects	Implementing agency	Supporting Agencies
Intermediate Outcome 1: Consistent and resilient government organization that responds to development requirements	1.1 Ensure clear operational and organizational roles and responsibilities in different ministries and government agencies. - ongoing target (end of term).	Project: Complete the review of the roles and organizational structures of all ministries and government agencies to coordinate their functions and address redundancies.		Council of Ministers
	1.2 By 2018, update the job description, categorization and classification in all ministries and government agencies in accordance with the Civil Human Resources Law No. 15 of 2016	Project: Descriptions, categorization and classification of government jobs	ADLSA	All government entities
	1.3 By 2018, develop a system that supports the control, follow-up and monitoring of the budget of Chapter I	Project: Rationalize spending on salaries and wages (Chapter I)		MOF
Intermediate Outcome 2: Efficient and Effective Government Performance	2.1 Develop an overall government performance monitoring system by 2019	Project: Establish a performance management framework for the public sector linked to QNV 2030	ADLSA	State Audit Bureau MDPS MoF
	2.2 Link the performance of ministries and government agencies to strategic plans and budgets by 2018.	Project: Link government performance to plans and strategies	MDPS	ADLSA MoF

Intermediate results	National targets	Projects	Implementing agency	Supporting Agencies
Intermediate Outcome 3: Improved institutional processes that enable government entities to provide distinctive services	3.1 Enable all citizens and customers to access various public services online by using a single user definition by 2020.	Project: E-government portal	MoTC	All government entities
	3.2 Provide coordinated and automated service delivery channels to facilitate cooperation and coordination among government entities by 2020.	Project: Establish self-service centers		All government service entities
	3.3 Build an integrated system of institutional processes to achieve excellence in service delivery by 2019.	Project: Streamline procedures and develop organizational work manuals for government entities.	ADLSA	All government entities
	3.4 Improve the service delivery efficiency in a competitive climate (ongoing target: end of term).	Project: Develop government service complexes.		All government entities
	3.5 Institutionalize the processes of measuring the efficiency of public services by 2019.	Project: Measure the satisfaction of government service beneficiaries	MDPS	All government entities

Intermediate results	National targets	Projects	Implementing agency	Supporting Agencies
Intermediate Outcome 4: Effective IT utilization in public service delivery	4.1 Full activation of the data e-management system and implementation of integrated e-services by the end of 2020.	Project: Government data management systems	MoTC	All government entities
	4.2 Adopt common government infrastructure by all government entities and link them under the umbrella of Qatar Digital Government Programme by the end of 2018.	Project: Develop the technology structure and common applications of ministries and government agencies		All government entities
		Project: Develop Qatar Digital Government Training Academy (2019-2022).		All government entities
Intermediate Outcome 5: Ministries and government agencies' strategic planning that focuses on Outcomes and outputs	5.1 Establish and institutionalize a planning, advisory technical support service system to enable government entities develop strategic plans to implement the national development strategies in line with QNV 2030 by 2020.	Project: Build and develop strategic planning capacities at ministries and government agencies.	MDPS	ADLSA - IPA
	5.2 Enact a legislation specifying the steps to NDS development, approval and implementation, together with operational plans and reporting mechanisms, adjust the track and remove implementation barriers by the end of 2018.	Project: Enact a national system for preparing, approval and implementation follow-up of national development strategies and executive plans.		QU
		Project: Develop a monitoring and follow-up system for the implementation of National Development Strategies		QF (specialized universities) Doha Institute for Graduate Studies
5.3 Develop a system to monitor and follow up the realization of development strategies by the end of 2019.				Council of Ministers All government entities MoTC

Intermediate results	National targets	Projects	Implementing agency	Supporting Agencies
Intermediate Outcome 6: Efficient management and outstanding performance of government human resources	6.1 Identify and address the existing gaps between supply and demand for talents and manage the employment surplus/deficit by 2019.	Project: Plan human resources (develop a central database for government sector employees)	ADLSA	MoTC
	6.2 Increase the recruitment and employment of talents to build a modern public administration by 2019.	Project: Link education outputs to labour-market needs, especially government entities		Ministry of Education and Higher Education QU QF (specialized universities). Doha Institute for Graduate Studies
	6.3 Develop and implement a strategic plan for the government human resources to ensure the development of human capacities in the public sector by end of 2019.	Project: National human resource strategy where entities with central functions are prioritized		MDPS MOTC MOF
	6.4 Provide a training tailored to the State's needs and career development goals for public sector employees - ongoing target (end of term).	Project: Develop and implement a comprehensive national training strategy		QU QF (specialized universities). MDPS Doha Institute for Graduate Studies
	6.5 Review the link between training and career paths in light of the findings of the government training programme evaluation and the Civil Human Resources Law 15 of 2016, by 2019.			

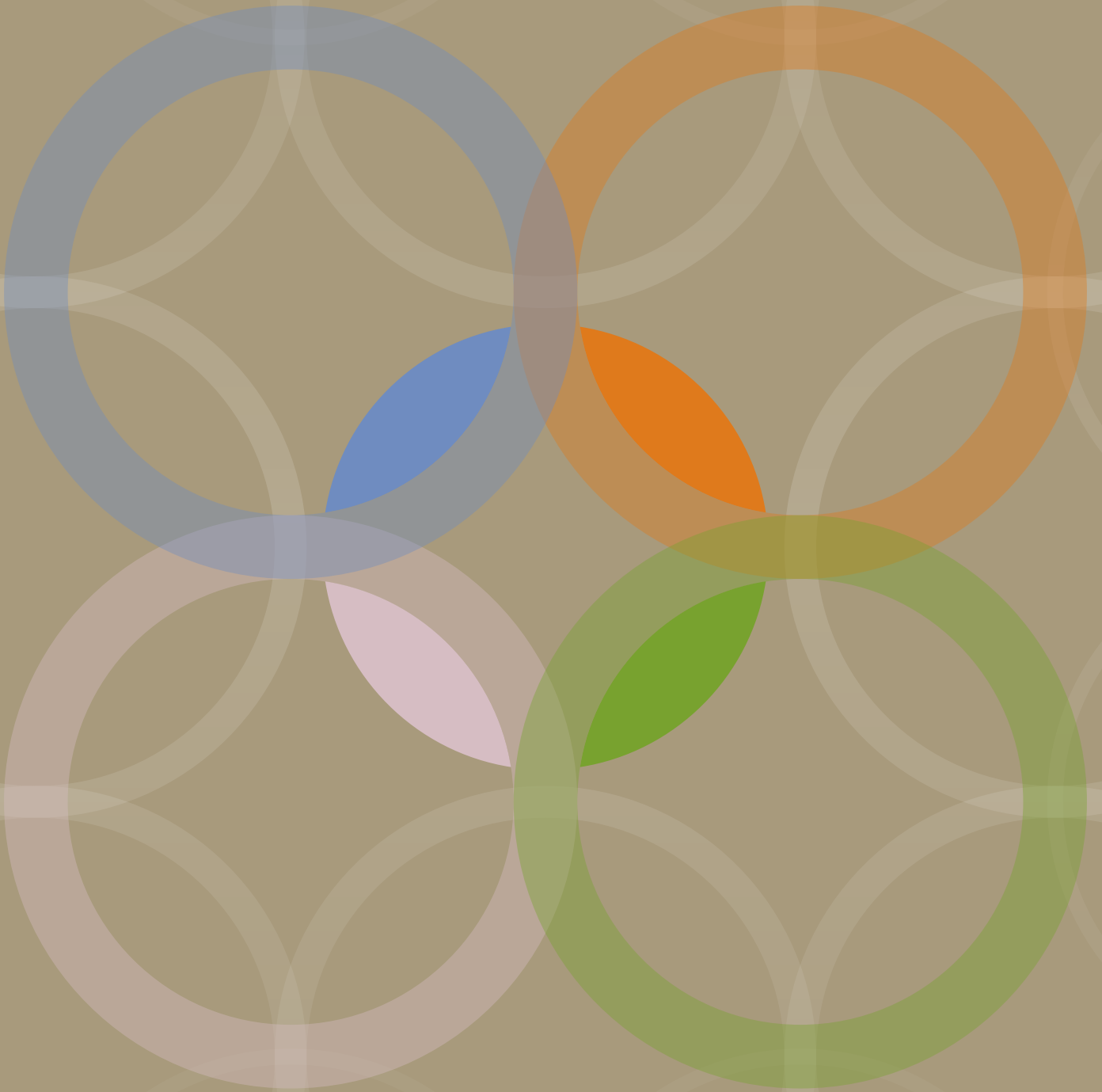
Intermediate results	National targets	Projects	Implementing agency	Supporting Agencies
Intermediate Outcome 7: Stable revenues of the State	7.1 Diversification of non-oil revenues - ongoing target (end of term)	Project: Expand the tax base	MOF	MoEC
	7.2 Mitigating the impact of oil price fluctuations on the State revenues by the end of 2018.	Project: Improve the performance of electronic tax collection programme		MoTC
		Project: Review the government fees		All government service entities
Intermediate Outcome 8: Optimal utilization of financial resources and public expenditures in line with the State's strategic plans	8.1 Develop a system for preparing, implementing and monitoring the State budget and for the management of financial resources by 2020.	Project: Financial Information Management System (Maliyah)	MOF	MoTC ADLSA State Audit Bureau
	8.2 Establish a system for reducing the share of current administrative expenditures from total expenditures of ministries and government agencies by 2018.	Project: Develop an expenditure plan linked to NDS-2 (2018-2022)		MDPS
Intermediate Outcome 9: Effective management of government procurement	9.1 Full activation of the Tenders and Bids Law and its executive regulations by the end of 2018.	Project: Contractor Performance Evaluation Programme	MOF	State Audit Bureau
		Project: Prepare unified forms for government service contracts.		MoTC
		Project: E-purchasing cards		MOJ
	9.2 Link the performance of ministries and government agencies to government procurement portal by 2018.	Project: Government Procurement Portal		Council of Ministers

Intermediate results	National targets	Projects	Implementing agency	Supporting Agencies
<p>Intermediate Outcome 10 Proper fiscal policies that maintain economic stability and prosperity</p>	10.1 Maintain the State's high credit rating - ongoing target (end of term).	Project: Develop a medium-term fiscal framework	MOF	All government entities
	10.2 Improve the quality and transparency of financial data by 2022.	Project: Provide financial data in accordance with SDDS		MDPS
	10.3 Strengthen the State's financial reserves and efficiently manage public debt by the end of 2018.	Project: Develop a medium-term strategy for public debt		Qatar Central Bank
	10.4 Effective coordination and integration between fiscal policy and monetary policy- ongoing target (end of term).	Project: Ensure effective coordination between fiscal policy and monetary policy	Qatar Central Bank	Qatar Financial Markets Authority Qatar Exchange
<p>Intermediate Outcome 11: Effective management of the State projects and quality capital assets</p>	11.1 Complete the implementation of major development projects in infrastructure, healthcare and education , as well as FIFA related projects by 2021.	Project: Capital expenditure Management	MOF	Supreme Council for Economic Affairs and Investment MoEC Supreme Committee for Delivery and Legacy Ministry of Education and Higher Education MoPH
	11.2 Enable the private sector to participate in public investment projects within a solid framework that ensures the achievement of the State's development outcomes, including knowledge/skill transfer, by 2020.			

Part III: Sustainable Economic Prosperity



Chapter I: Economic Infrastructure Development



1. Introduction

Qatar has committed itself to developing a comprehensive urban development plan and a sustainable urbanization and population distribution policy. Since QNV 2030 is a general framework for detailed strategies and operational plans, the State of Qatar prepared NDS-1 (2011-2016) in which Chapter III was dedicated to discuss the sustainability of economic prosperity that illustrates Qatar's development path through, inter alia, promoting an efficient economic and technical use of natural resources, providing infrastructure services, and enhancing market efficiency. In this context, NDS-1 called for improving urban transport infrastructure, implementing a national land-use plan, building high-quality physical and IT infrastructures to meet the requirements of Qatar's economy and its various sectors, and enhancing the quality of economic infrastructure services to meet the emerging needs of Qatar population. This requires set-up programmes and projects with specific costs and optimal technical specifications under comprehensive legislation, effective procedures and full coordination among stakeholders. Investment in economic infrastructure increases the efficiency of the economy, expands its absorptive capacity, avoids bottlenecks, enhances competitiveness, and encourages domestic and foreign investment.

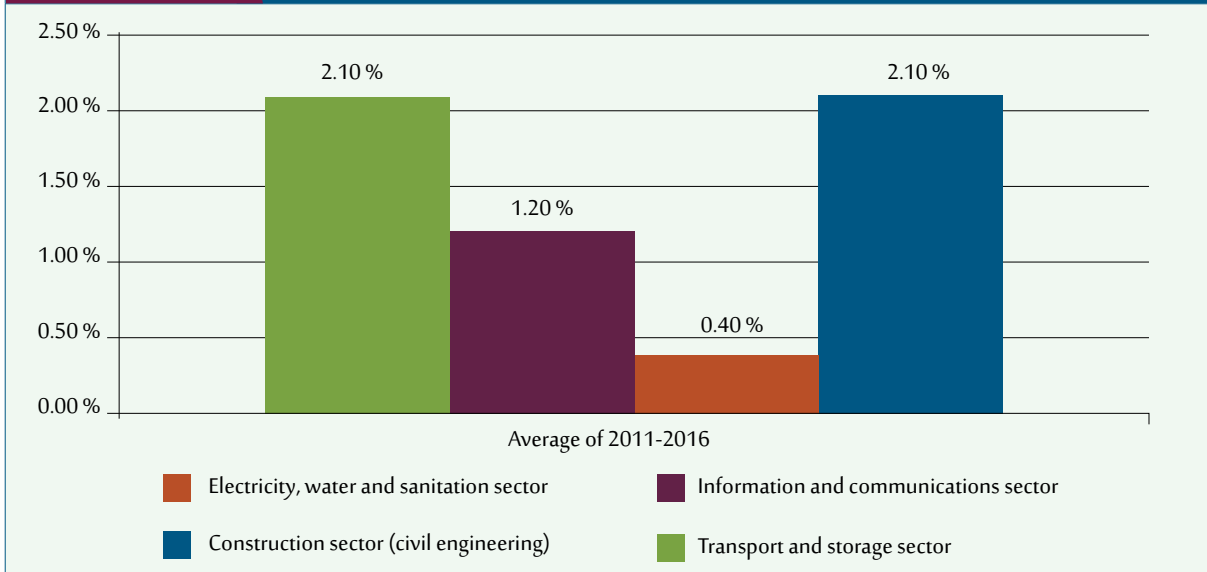
Given that development is an ongoing process, the NDS-2 (2018-2022) builds on the NDS-1 achievements and complements what has not been achieved, particularly in the economic infrastructure development sector and its subsectors of transport (roads, ports, airports and railways), storage, sanitation and treated wastewater networks, information and communication technology (ICT), construction materials, logistics, and construction sector (civil engineering).

The infrastructure sector is important to the Qatari economy due to its contribution to GDP and the labour market. Over the period 2011-2016 (in 2013 constant prices), the average added value of the transport and storage sector was nearly 2.1% of the GDP (Figure 3.1.1) and the sector, on average, employed 3.0% of total employment in Qatar (Figure 3.1.2); the communications and information sector contributed about 1.2% of the GDP and employed 1% of total employment; the electricity, water and TSE sector contributed approximately 0.4% of the GDP and employed around 1.2% of total workers in the state of Qatar; and the construction sector (civil engineering) contributed nearly 2.1% of the GDP and employed 240,977 workers (12.3% of total employment in 2016).

Thus, the average GDP of the economic infrastructure sector (EIS) was about 6% over the period 2011-2016, which is a modest contribution. It also employed around 17% of the total number of the workers in the Qatari labour market, which is a high percentage (the value added is nearly QAR 55 billion with some 342,000 workers in 2016, indicating a high labor concentration in these sectors).

Figure (3.1.1):

Contribution of transport, communications, information, electricity, water, TSE and constructions (civil engineering) sectors in GDP at 2013 constant prices, average period (2011-2016) (%)

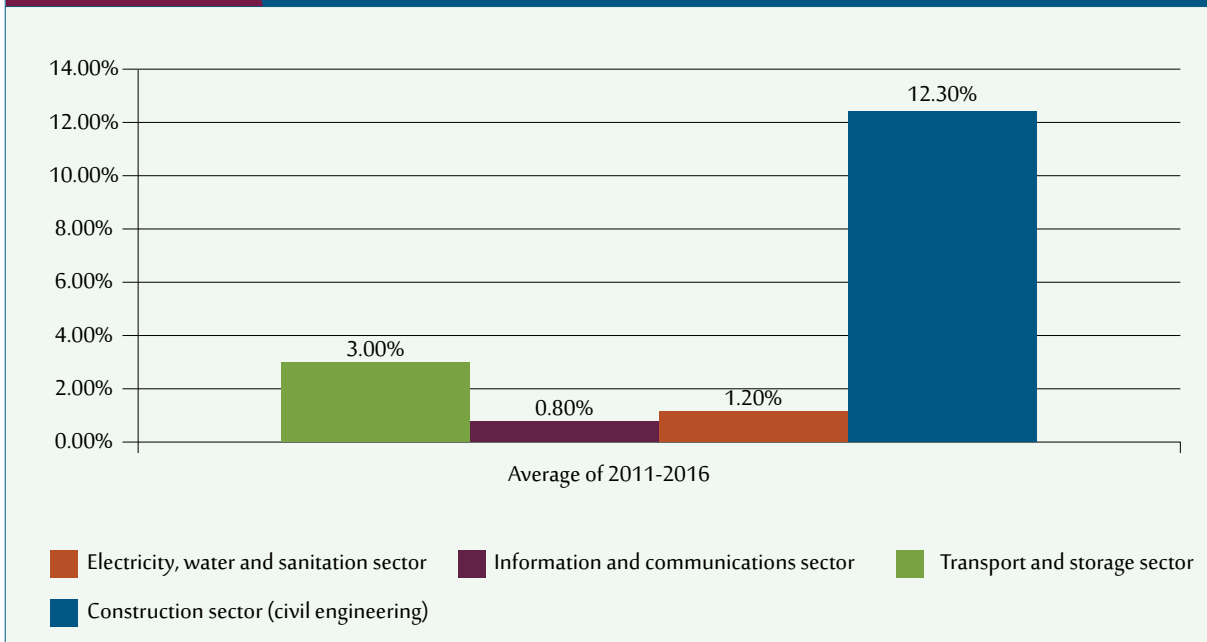


Source: MDPS: (1) National Accounts Bulletin 2016; (2) Annual Bulletin of Construction Statistics, various years.

(Civil engineering)⁴³

Figure (3.1.2):

Contribution of transport, communications, information, electricity, water, sewage and construction (civil engineering) sectors in labour market, average period (2011-2016) (%)



Source: MDPS: (1) Labour Force Statistics Bulletin: different years; (2) Annual Bulletin of Construction Statistics, various years.

⁴³ Civil engineering: includes general constructions related to building, altering and repairing engineering projects (bridges; airports; sewage, water, electricity and telephone systems). It also includes mine-related installations; drilling of oil and gas wells; oil and gas pipelines; ports, quays, and shipyards; and all other constructions other than buildings).

2. Progress towards achieving economic infrastructure sector outcomes and targets (2011-2016)

This section describes the progress made towards realizing Economic Infrastructure Sector (EIS) outcomes and targets during 2011-2016, where infrastructure services improved markedly despite the significant challenges in terms of project design and phasing, and of the maintenance of new assets and the consequent additional financial obligations.

The NDS-1 indicated the need to define uniform national spatial planning standards for land use, reflecting economic development and rapid population change. It therefore included a set of targets: adopt the implementation of Qatar National Master Plan (QNMP), the Integrated Transport Plan and the Integrated Land Use Plan to meet the rapid expansion of the road network and subway constructions; formulate a national strategy and an integrated infrastructure plan; identify and enhance the capacity of the focal points for the strategy, which in turn required the development of infrastructure legislation; and establish a regulator body to regulate the use of industrial land, manage and regulate the sector and make investment decisions as per project priority. It also proposed a complementary target for conducting a review of the Doha Metro due to lack of clarity, risk and absorptive capacity of this project in 2010, in addition to upgrading the road infrastructure to avoid traffic and inefficiency.

To strengthen the ICT sector, the NDS-1 called for the adoption and implementation of the strategy of the (formerly) Supreme Council of Information and Communication Technology. This was in addition to a special review of the second and third phases of the New Doha Port Project, with the capacity of the port peaking in 2010, and its location causing work inefficiency. Finally, give due attention to the review of the feasibility of additional investments in infrastructure to promote sustainable use of resources.

Reference should be made to the CoM Decision No. 77 of 2014 concerning QNMP where five spatial development plans were drafted and adopted for the five municipalities and 17 blueprints for urban centers are underway for the municipalities studied. The QNMP provided an umbrella for a spatially oriented national development framework, spatial development plans at the municipal level and determinants of urban development, which necessitates accelerating their implementation.

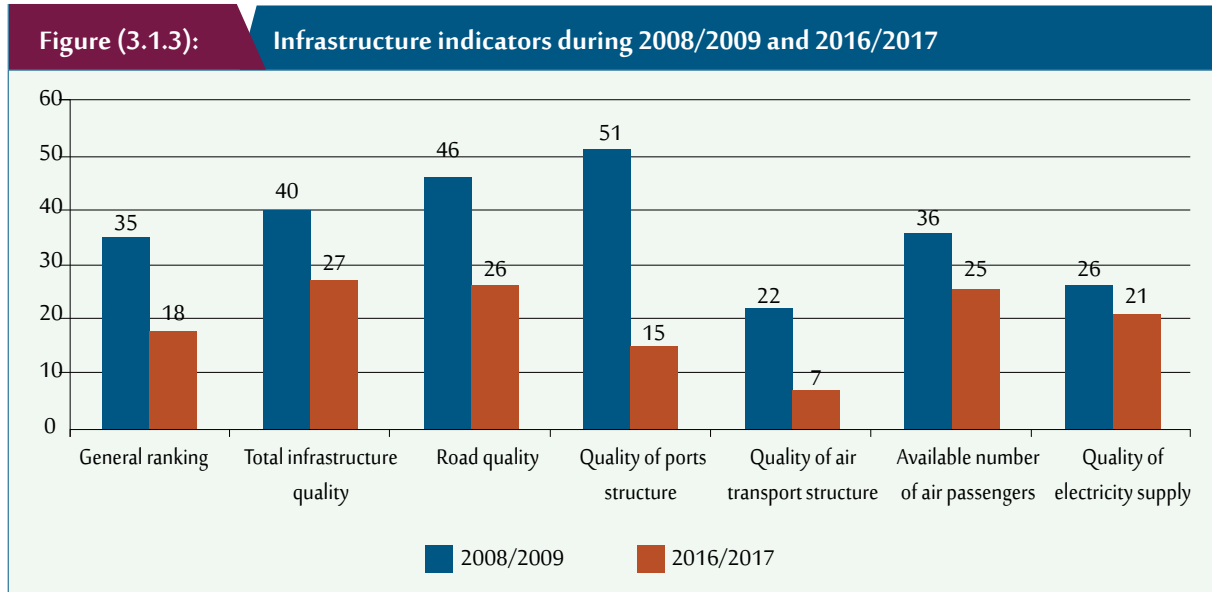
A new Ministry of Transport and Communications (MoTC) was established in June 2013, with some progress made in the development of the Integrated Transport Plan. Comprehensive plans have been developed for infrastructure sub-sectors and they are in the pipeline, but need further coordination, which necessitates accelerating their implementation. In addition, Phase I of the Hamad Port was completed in 2016 and is now operational. Phase I of the Ruwais Port was completed in January 2015, in addition to the completion of some road projects.

TSE volume in 2015 amounted to 194 million cubic meters or around 98.2% of total wastewater. Nearly 66 million m³ were used in agriculture (feed), around 31 million m³ in the irrigation of green landscapes and public parks, and about 57 million m³ in deep injection into the non-freshwater aquifer. Further, 39 million m³ were discharged into lagoons, which is a waste of a sustainable water resource and a financial waste due to the costs of such treatment.⁴⁴ As part of the development of Qatar's Water Plan and Strategy, the water policy was developed, and the water strategy is expected to be finalized in the first quarter of 2018. With regard to issuing the Water Law, the draft of the National Water Law and its executive bylaw have been finalized. As for the excessive depletion of groundwater, a draft law to regulate groundwater wells drilling has been completed. Also, a project to link GCC countries with railways is being studied and is expected to improve the efficiency of railway freight transport among these countries.

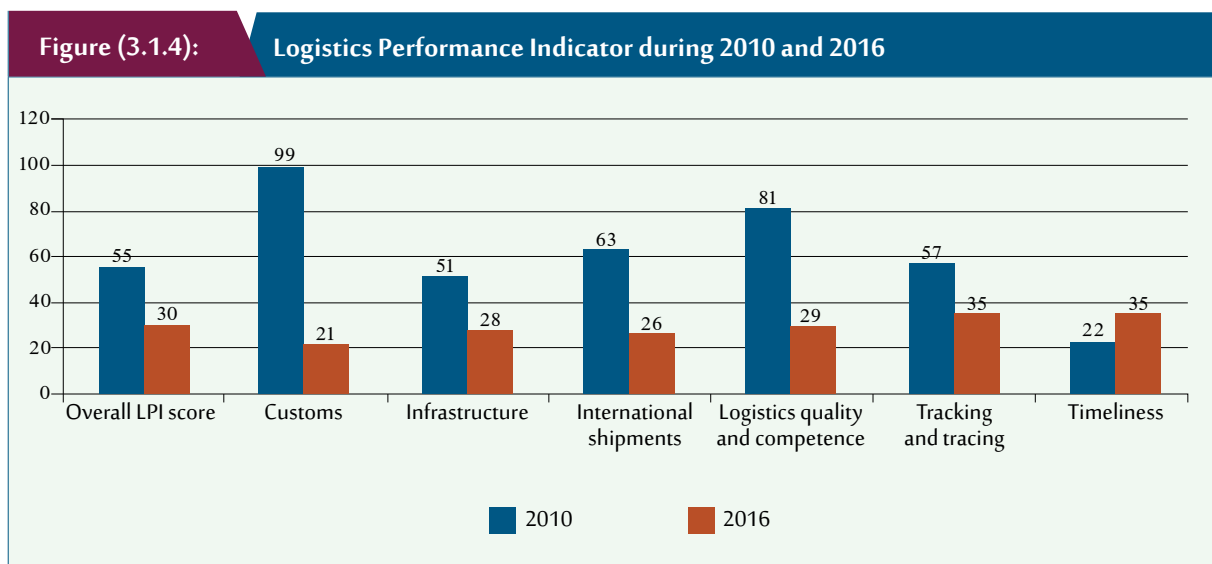
⁴⁴ MDPS, Annual Statistical Abstract, Chapter XI, Environment Statistics, 2015.

Although infrastructure services are improving, it is difficult to assess their responsiveness to the current and future needs, and the efficient construction, operation, maintenance and financial cost of assets. Therefore, some international indicators were used to assess the quality, efficiency and effectiveness of infrastructure and the delivery of logistics services. Indeed, the quality of infrastructure has improved since 2008. The Global Competitiveness Report of the World Economic Forum ranked Qatar 18th out of 138 countries on the infrastructure index in 2016/2017 (Figure 3.1.3).

In addition, Qatar ranked 30th out of 160 countries on the World Bank's 2016 Logistics Performance Indicator, compared to 55th in 2010 (Figure 3.1.4).



Source: World Economic Forum, Global Competitiveness Report, various years.



Source: WB, Logistics Performance Indicator, 2016.

The landline phones spread rate for every 100 people over 2008-2014 declined from 18.2 lines in 2008 to 16.4 in 2014 due to increased use of mobile phones. In contrast, the number of mobile phone subscribers per 100 people increased from 105.2 in 2008 to 153.6 in 2015 due to a developed life style, a higher per capita GDP, and population increase. Further, the number

of Internet users per 100 people went up from 44.3 in 2008 to 92.9 in 2015 (according to the World Bank indicators) due to a high educational attainment, developed Internet services, and the connectivity of countries to broadband Internet. Also, the personal computer penetration index for every 100 persons increased from 32.2 in 2008 to 77.8 in 2013 in view of a high standard of living; increased penetration of Internet services in public services, education, trade and businesses; and moving towards a knowledge economy.

3. Challenges facing the EIS (2018-2022)

Transport and storage sector is vital for national economy due to its horizontal and vertical linkages to other sectors. The challenges facing this sector include how to increase coordination among relevant line government agencies. Particularly in the field of prioritizing the projects, accurately identifying the size of the investments required, determining demand expectations and effective implementation of relevant projects to ensure sustainable transport, coupled with issuing appropriate legislation, providing relevant data and building the technical capacities of human resources.

The ICT sector faces a number of challenges, mainly: security issues, such as hackers of websites and social media platforms and cyber security in the financial sector; slow pace of keeping up with new services and rapid global developments, such as Voice over Internet Protocol (VoIP) communications, electronic clouds and others; and monopoly practices by the companies implementing the communication infrastructure sector. Overcoming these challenges requires cooperation with regional and global telecommunication companies and the strengthening cyber security culture.

Increasing coordination among government and non-government entities relevant to Energy and Water Sector is also among the challenges. These challenges can be overcome through an integrated and sustainable management, or a regulator, of energy and water. Such an integrated and sustainable management/regulator will develop policies, strategies and legislation necessary for the sector; develop plans for the projects as per their priorities; and improve energy efficiency and security, the efficient use of TSE which is expected to increase as the population increases, and the use of renewable energy, which limits pollution and gas emissions and generates economic returns.

In light of the scarcity of natural raw materials produced by Qatar and usable for public constructions such as roads; bridges; airports; constructions of mines, ports, docks and shipyards; and all other constructions other than buildings (e.g. limestone, gabbro, crushed or broken stones, and gypsum, of which Qatar's imports in April and May 2016 amounted to some QAR 436 million) accompanied by an increase in infrastructure projects. In order to avoid bottlenecks in such projects, the NDS encouraged the recycling of construction waste. Construction waste can be recycled to make use of them as construction materials, which reduces the cost of imported raw materials, preserves the environment for future generations, and reduces the logistical burdens of import and transportation.

The EIS focus of the NDS-2 was on promoting recycling to provide other sources of structural materials, while preserving the environment, developing relevant legislation, providing related databases, promoting research, reviewing legislation on local construction materials, and qualifying workers in the quality control of construction materials. Therefore, the private sector should be encouraged to invest in this area.

4. EIS Main outcome, intermediate outcomes and targets (2018-2022)

Despite the decline in oil prices over the past three years, which has affected the government revenues and public spending, Qatar is aware of the importance of the economic infrastructure sector and related challenges. The country is expanding necessary investments to improve its services, improving the situation of all water resources and forecasting its future prospects.

Qatar therefore works to increase and strengthen coordination among the government agencies involved in the effective implementation of the 2022 FIFA World Cup projects, Metro and Hamad International Airport projects, the QNMP and its projects, as well as in these projects' prioritization and accurate identification of their investment. Qatar also seeks to develop appropriate administrations to manage the Hamad Port, the Hamad International Airport (HIA), the Metro Project and the Renewable Energy Project. Qatar looks forward to a more efficient use of ICT through the improvement and development of government e-services and of communications infrastructure services, and the promotion of the recycling of construction materials, accompanied by special national legislation.

Qatar recognizes the importance of developing an FDI legislation and other legislation that stimulates private sector participation to invest in economic infrastructure, placing it at the forefront of its priorities to maintain its rates of economic growth since economic infrastructure projects achieve long-term development goals and respond to the growing demand for water and electricity and to a prospective future pressure on wastewater networks and groundwater for irrigation of fodder, green landscapes, district cooling, hotels, stadiums and other projects. Necessary steps will therefore be taken to reprioritize economic infrastructure projects that meet the NDS-2 (2018-2022) goals and investment and capitals will be channeled towards such projects.

Main outcome

“Develop a sustainable and high-quality infrastructure that supports the national economy and is capable of keeping abreast of the latest smart technologies” To achieve the main outcome, the following intermediate outcomes and targets have been identified:

Intermediate outcome 1: An infrastructure created by economic and sustainable materials

To conserve the environment and sustainability, the NDS-2 focuses on the use of waste recycling techniques in support of infrastructure projects. Usable waste is non-organic and non-hazardous solid waste that can be utilized directly or after recycling as structural materials after ensuring conformity to Qatari construction specifications. Such wastes can also be used as an enhancer for natural structural materials. Such waste includes, but is not limited to, the residues of drilling and demolition of buildings; industrial waste such as iron slag; and the waste of quarries, refineries and manufacturing like sand-washing (valley stones).

Due to increased industrial and infrastructure projects, modernization of roads and preparation for the 2022 FIFA World Cup projects of stadiums and hotels, the industry of construction materials in Qatar is becoming increasingly important. These projects produce 10-12 million tons of demolition debris per year, with the Rawdet Rashed landfill already having 80-100 million tons of demolition debris. On the other hand, there is no law obliging foreign companies to purchase a certain percentage of construction raw materials from the domestic market.

The iron industry produces about 0.5 million tons per year of iron slag, and the Qatar Steel Industries Factory has a total of 1.5 million tons. The output of drilling in infrastructure projects reaches 5-7 million m³ a year, while currently unused residues

of sand washing are estimated at 2 million tons with an estimated annual increase of 1 million tons. The current production capacity of recycling to produce stones in different sizes is estimated at nearly 1,000 tons per day.

In the EIS, the NDS-2 (2018-2022) focuses on promoting recycling to provide other sources of structural materials, while preserving the environment, developing relevant legislation, providing related databases, encouraging relevant research and legislation on local construction materials, and qualifying workers in the quality control of construction materials. Therefore, the private sector should be encouraged to invest in this field. This outcome will be realized through:

- **Target:** Increase the proportion of recycled materials in projects to 20% of the total materials used by 2022

Intermediate outcome 2: Qatar's Infrastructure has a water sector with a comprehensive and integrated management

Among the positive outcomes of the NDS-1 was the provision of a sustainable and cheaper water resource consistent with the local and international standards for TSE used in various economic and developmental activities. According to 2015 statistics, the TSE volume amounted to 194 million m³ per year, of which about 50% were reused in irrigating public parks and cultivating animal feed in Rakiyah farms. The remaining quantities were either injected into the aquifer or surface reservoirs, which is a waste of a sustainable water resource and also a financial loss given the huge cost of treatment, injection and control of that process to avoid the adverse impact of TSE injection on the natural aquifers.

The NDS-2 therefore encouraged the expansion of TSE use in Qatar and the development of water management in industrial zones, with enhanced efficiency and proper management of water use, which would promote and activate the private sector participation in supporting water sector projects. This outcome will be achieved through the following targets:

- **Target 1:** Provide infrastructure to use 70% of the TSE produced in different projects by 2022
- **Target 2:** Establish an integrated management of water and of accompanying contaminants in industrial zones by 2022
- **Target 3:** Reduce loss of drinking water rate (actual + administrative) to 8% by 2022

Intermediate outcome 3: Qatar's infrastructure has sources of energy and renewable energy

Qatar has made limited progress in renewable energy production and the share of renewable energy of total national energy needs is negligible despite the high potential for renewable energy.

In this context, Qatar seeks to diversify the energy mix produced there. Qatar Water and Electricity Company signed an agreement with the Emirati Masdar Company and the Qatari Nebras Company to establish a joint working relationship to develop renewable and sustainable energy projects. The Ministry of Energy and Industry (MoEI) is developing and implementing a renewable energy strategy along with its policy and legal umbrella. In addition, Kahramaa is developing a plan to generate 200 megawatt of solar energy by 2020, to be increased to 500 megawatt afterwards, due to the relevant projects of Qatar Petroleum (QP). The adoption of renewable energy projects will no doubt reduce CO₂ emissions, decrease the amounts of oil and gas used in desalination and power generation, and satisfy the growing demand for energy. This outcome will be achieved through the following targets:

- **Target 1:** Improve and implement energy efficiency by 10% and utilize existing Gulf connectivity network infrastructure by 2022

- **Target 2:** Increase the production capacities of power stations and improve the production and use of renewable energy to meet the increasing demand for electricity to reach a production of 200 megawatt of renewable energy by 2020 to be increased to 500 megawatt afterwards
- **Target 3:** Identify the components of the energy mix for power supply security in Qatar by 2020

Intermediate outcome 4: A smart and sustainable infrastructure that supports urban and economic development in Qatar

The air transport sector has made significant progress with the opening in 2014 of HIA that receives nearly 32 million passengers per year and can compete with regional airports, and with the provision of high-quality air services by Qatari Airways. Phase III expansions of HIA confirm the importance of meeting the expected increase in passenger arrivals from 30 million to 53 million per year by the end of 2022, and also meeting the growth of cargo forwarding, air freight and global air traffic, including that of Qatar Airways.

The Railway and Doha Metro Project aims to establish an integrated public transport network to limit the use of automobiles, particularly in terms of the commutation of students, workers and staff, reduce traffic jams and accidents, save commutation time, contribute to transport of goods, and reduce environmental pollution. It is expected that 70% of the Doha Metro Project will be completed by 2018.

Hamad Port, which became operational in 2016, is expected to transport six million containers a year upon the completion of its operation phases in 2020 through three container terminals. Its current annual capacity is less than two million containers. This outcome will be achieved through the following targets:

- **Target 1:** Expand and modernize air and sea transport facilities and upgrade their operating systems by the end of 2022
- **Target 2:** Continue the implementation of Phase I of the Doha Metro and start operations by 2020
- **Target 3:** Complete the implementation of the National Comprehensive and Integrated Infrastructure Plan in coordination with relevant stakeholders by 2022
- **Target 4:** Implement the policies and operational procedures of the Qatar National Master Plan by 2022.

Intermediate outcome 5: A high-quality and safe ICT infrastructure

The ICT sector plays an important role in meeting the requirements of economic and social development, and in enhancing productivity and transformation towards a knowledge economy. In this context, Qatar has made significant achievements in the development of joint government applications and the implementation of Phase II of the Government Network and Government Data Center, as well as a the Government Human Resources System (Mawared) and correspondence and data exchange. It has also developed three policies for Qatar e-government: Data Management Policy, E-Participation Policy, and Open Data Policy. All this led Qatar to rank 27th out of 143 countries on the Networked Readiness Index in 2015.⁴⁵ This demonstrates the ability of the State of Qatar to apply and make full use of ICT.

45 International Economic Forum/Global Information Technology Report of 2016.

Qatar also ranked 48th out of 193 countries in the E-Government Development Index in 2016.⁴⁶ Despite these achievements, the MoTC still has great expectations and ambitions to raise the efficiency of government administrative processes, adopt common government services, and upgrade ICT infrastructure using advanced technologies and software in all e-services. This will be achieved through the following targets:

- **Target 1:** Improve telecommunication infrastructure services by 2018
- **Target 2:** Enhance the efficiency of the e-government services by 2018

5. Conclusion:

A sustainable economic prosperity requires more investment in economic infrastructure, which in turn will increase the economy's efficiency and capacity, avoid bottlenecks and improve competitiveness.

Despite the many achievements made in the economic infrastructure sector (transport; communications and information; supply of networks of electricity, water and TSE; and construction (civil engineering), it is difficult to assess how well they meet economic and human needs and their efficient operation and maintenance. However, there are some indicative rankings of Qatar on international indicators, including the Infrastructure Index (Qatar ranked 18th out of 138 countries) and the Logistics Performance Index (30th out of 160 countries), both in 2016. To overcome future EIS challenges over the period 2018-2022, the Strategy continues to seek to achieve a main outcome: 'Develop a sustainable and high-quality infrastructure that supports the national economy and is capable of keeping abreast of the latest smart technologies' by providing sustainable water; increasingly producing traditional and renewable energy; recycling project residues; more coordination among relevant government entities, particularly in prioritizing projects, accurately identifying the volume of their required investment and determining its expected demand; enacting appropriate legislation; providing data and technical capabilities; and addressing security issues (cybersecurity).

⁴⁶ UN/Department of Economic and Social Affairs/UN E-Government Report/E-Government Index 2016.

6. Annex:

Intermediate outcomes, targets, projects, and implementing agencies that contribute to achieve the main outcome “Develop a sustainable and high-quality infrastructure that supports the national economy and is capable of keeping abreast of the latest smart technologies”

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
Intermediate Outcome 1: An infrastructure created by economic and sustainable materials	1.1 Increase the proportion of recycled materials in projects to 20% of the total materials used by 2022	Develop a manual on the exploitation of local materials and waste, including methods of sorting, storing and labeling, and identify areas of optimum exploitation after the necessary specialized studies have been conducted	MME	Ashghal Qatar General Organization for Standards and Metrology QU
		Develop legislation and building specifications to encourage the recycling of waste that include methods of dealing with waste, binding ratios, incentives and penalties	Ashghal	MME
Intermediate Outcome 2: Qatar's Infrastructure has a water sector with a comprehensive and integrated management	2.1 Provide infrastructure to use 70% of the TSE produced in different projects by 2022	Establish a material research center	Ashghal	MME QP
		Implement projects for TSE systems to cover 70% of the produced TSE	Ashghal	MME QP
		Plant wooden forests and trees to conserve and widely use TSE to serve Qatar's environment	MME	Public Parks Department
Intermediate Outcome 2: Qatar's Infrastructure has a water sector with a comprehensive and integrated management	2.1 Provide infrastructure to use 70% of the TSE produced in different projects by 2022	Create windbreaks using wood forests to provide shelter from dust storms that blow over Doha and ward off their various health and environmental impacts. This process helps reduce the risks and causes of respiratory diseases.	MME	Public Parks Department
		Use activated sludge produced from treatment plants after processing in safe fertilization of areas planted with wood forests.	MME	Public Parks Department

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
	2.2. Establish an integrated management of water in of accompanying contaminants in industrial zones and by 2022	Develop mechanisms for a possible expansion of TSE systems for facilities and sites with high-use needs, such as central cooling plants	Ashghal	
		Establish industrial lakes at different locations in Doha to store TSE as a safe strategic water stock	Ashghal	
		Complete the environmental development of lakes through using them to breed sterile fish species that purify lakes as well as create a green belt and parks around the lakes	Ashghal	MME
		Conduct specialized environmental studies to assess the rates and characteristics of industrial waste and the resulting contaminants to help establish an integrated system for industrial waste treatment and integrated water management	MME	Ashghal
		Establish a database to identify industries and classify them by type of pollutants	Ashghal	
		Find economical and effective ways to reduce pollution of industrial waste	Ashghal	
		Reduce emissions of different industries from the source	MME	
		Develop and implement a monitoring program for the facilities and sites connected to the state networks to enable the government to control pollution at the source	Ashghal	MME

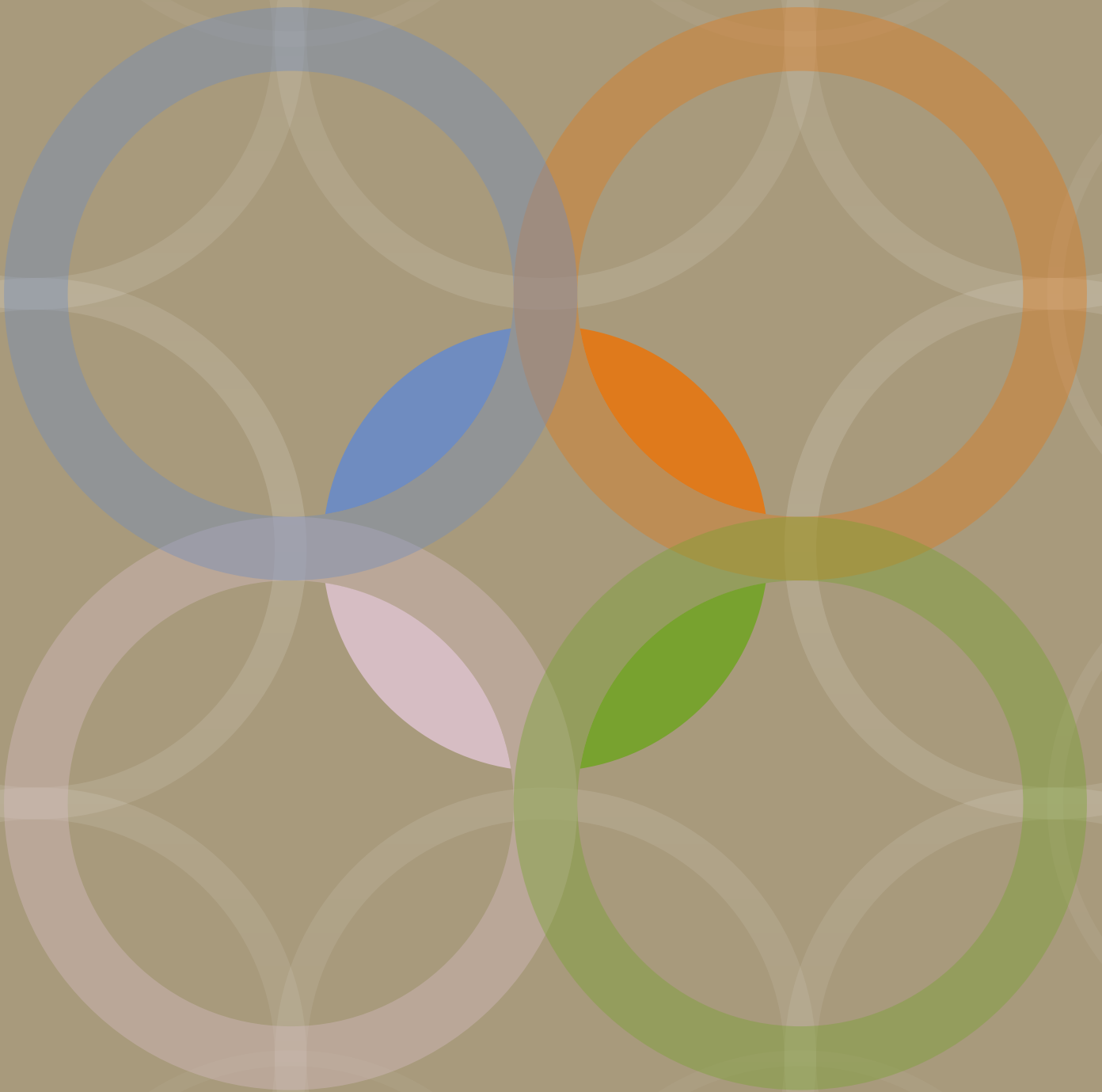
Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
	2.3 Reduce loss of drinking water rate (actual + administrative) to 8% by 2022	Improve the collection and invoicing of consumption readings and continue to use modern techniques to reduce water losses	Kahramaa	
	3.1 Improve and implement energy efficiency by 10% and utilize existing Gulf connectivity network infrastructure by 2022	Develop energy efficiency improvement and application programmes and enhance use of Gulf connectivity	Kahramaa	
	3.2 Increase the production capacities of power stations and improve the production and use of renewable energy to meet the increasing demand for electricity to reach a production of 200 megawatt of renewable energy by 2020 to be increased to 500 megawatt afterwards	A solar energy project for the production of 200-500 megawatt of electricity by 2020	Kahramaa	
Intermediate Outcome 3: Qatar's infrastructure has sources of energy and renewable energy	3.3 Identify the components of the energy mix for power supply security in Qatar by 2020	Develop a renewable energy policy and establish rules governing charges, procurement and connectivity to the main network	Kahramaa	
Intermediate Outcome 4: A smart and sustainable infrastructure that supports urban and economic development in Qatar	4.1 Expand and modernize air and sea transport facilities and upgrade their operating systems by the end of 2022	Implement the expansion stages of the Hamad Port and HIA	MoTC	

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
	4.2 Continue the implementation of Phase I of the Doha Metro and start operations by 2020	Continue implementing the Doha Metro Project – Phase I	Qatar Rail	MoTC MME
	4.3 Complete the implementation of the National Comprehensive and Integrated Infrastructure Plan in coordination with relevant stakeholders by 2022	<ul style="list-style-type: none"> The National Comprehensive Infrastructure Plan Develop, update and manage the Plan database, including the operational infrastructure data (as built) Promulgate legislation on private sector investment in infrastructure 	MME	Ashghal Kahramaa QP QF
	4.4 Implement the policies and operational procedures of the Qatar National Master Plan by 2022	<ul style="list-style-type: none"> Implement policies for the National Development Framework Apply municipal spatial development plans Develop, adopt and implement an urban management system Develop a spatial map of investment opportunities in Qatar 	MME	
	5.1 Improve telecommunication infrastructure services by 2018	Develop a plan for reference offers for access to communication infrastructure	MoTC	Governmental and quasi-governmental entities and the private sector
Intermediate Outcome 5: A high-quality and safe ICT infrastructure	5.2 Enhance the efficiency of the e-government services by 2018	Expand international exchange points (IXP)	MoTC	Governmental and quasi-governmental entities and the private sector
		Develop the common government communications infrastructure	MoTC	Governmental and quasi-governmental entities and the private sector
		Develop the common e-government service programme	MoTC	Governmental and quasi-governmental entities

Part III: Sustainable Economic Prosperity



Chapter II: Economic Diversification and Private Sector Development



1. Introduction

Economic Diversification and Private Sector Development (EDPSD) are an essential pillar in the process to a more stable and immune economy against the fluctuations of the global economy. The world market experiences dynamic fluctuations that adversely affect small-scale economies that rely on natural resources as a major source of income. Economic diversification and private sector development have become increasingly important in light of the decline of Qatar's natural resources sector returns as a result of oil and gas prices fall to unprecedented levels in mid-2014, and the subsequent negative impact on Qatar's economy..

The importance of economic diversification lies in expanding the choices of the national economy, strengthening its production base, diversifying its sources of income, enabling the private sector to participate effectively in economic activity, and ensuring the sustainability of and maintaining the available economic resources.

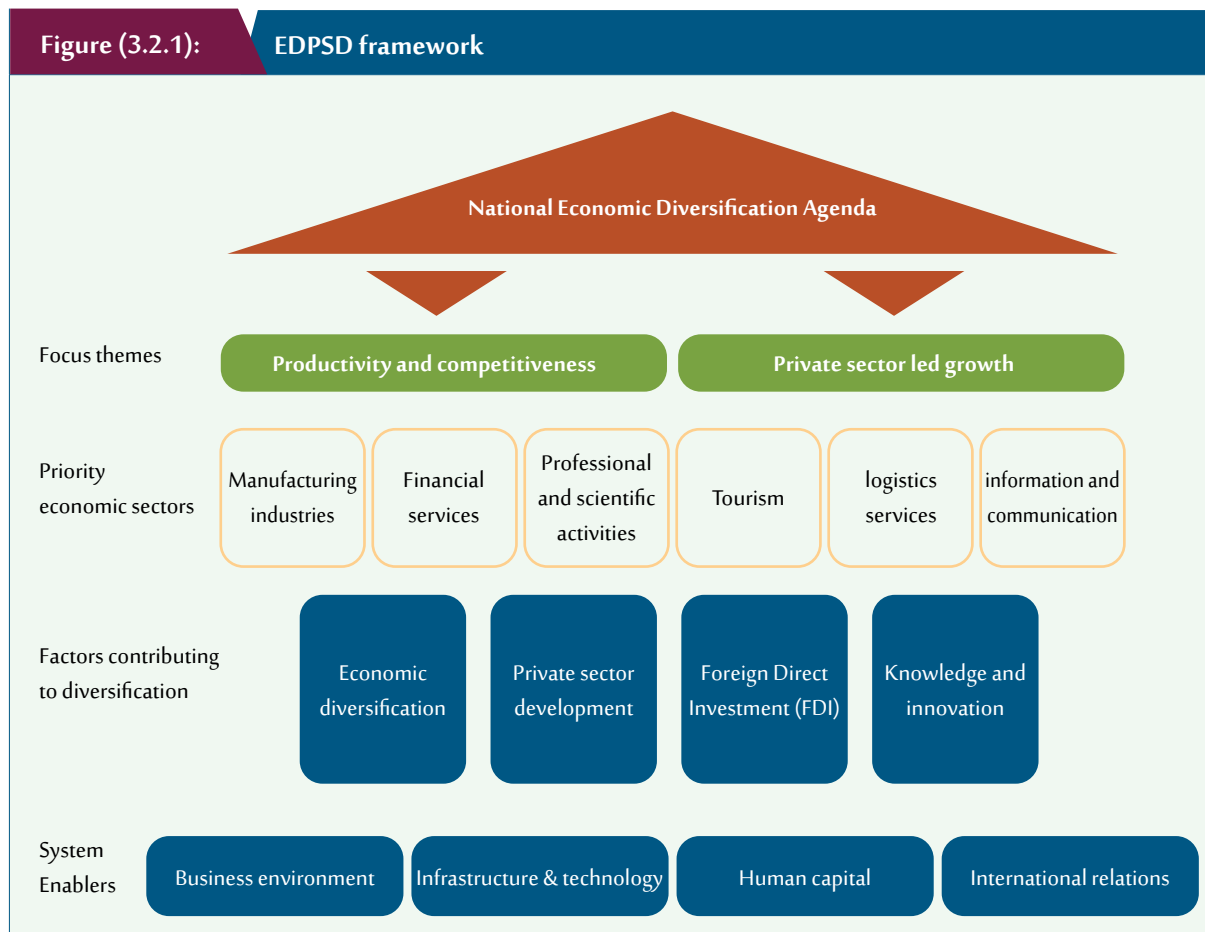
The concepts and methods of economic diversification vary from one aspect to another depending on the economic development plan. To some planners, diversification may only mean to diversify the portfolio of investments in state-owned external (foreign) assets and their proceeds (rate of return). This concept is short-sighted and non-strategic policy because foreign assets are always subject to high risk and would make the economy highly vulnerable to the fluctuations of the world financial markets.

Furthermore, economic diversification may involve diversifying the export structure of the national economy beyond oil and gas, where its focus will be on supporting and prioritizing the potential sectors with a particular group of goods and services. The concept may be further broadened to include strengthening the production base of the national economy, promoting domestic and foreign investment, creating opportunities for the private sector and entrepreneurship, deepening innovation and creativity, and strengthening the business environment and market efficiency.

On the other hand, economic diversification may expand to include, in addition to what has been mentioned previously, establishing a conducive business environment to support various economic activities throughout its dimensional profiles including institutional, legislative, legal, regulatory and procedural aspects. They may also include upgrading the efficient use of tangible production assets, mainly basic infrastructure and public utilities, as well as efficiently utilizing the intangible assets, such as human capital and its productivity and its contribution to economic activity.

Based on the previous backdrop, it is evident that the path of economic diversification may take various forms with complicated interlinked relationships and therefore diversifying the national economy requires clarity in vision and direction, and a precise definition of the scope, objectives, interventions and the allocation of required resources. In fact, it may take a long time or a short time to develop a policy framework to steer the diversification process. However, it depends on what kinds of interventions and detailed implementation initiatives required to achieve the aim of the economic diversification.

The Economic Diversification and Private Sector Development strategy is driven by the National Diversification Agenda and hinges on two strategic focus areas: (1) productivity and competitiveness as well as (2) private sector led growth. In addition to identifying six priority economic sectors to develop the national economy as displayed in the framework of economic diversification and private sector development (Figure 3.2.1). The diversification framework provides criteria for selecting priority sectors in line with characteristics of the State of Qatar as a country rich in natural resources, small in size, and limited in the size of the local workforce. Priority economic sectors include the manufacturing, financial services, professional and scientific activities, and technological information and communication (ICT). In addition they include tourism and logistics services as catalyst or promoter of other sectors. The diversification framework provides the direction for the development of sector-specific strategies and cross-sector initiatives along four diversification enablers and four cross-sector systemic enablers



Source: Ministry of Economy and Commerce: EDPSD Strategy 2017-2022

2. Progress towards EDPSD outcomes and objectives (2011-2016)

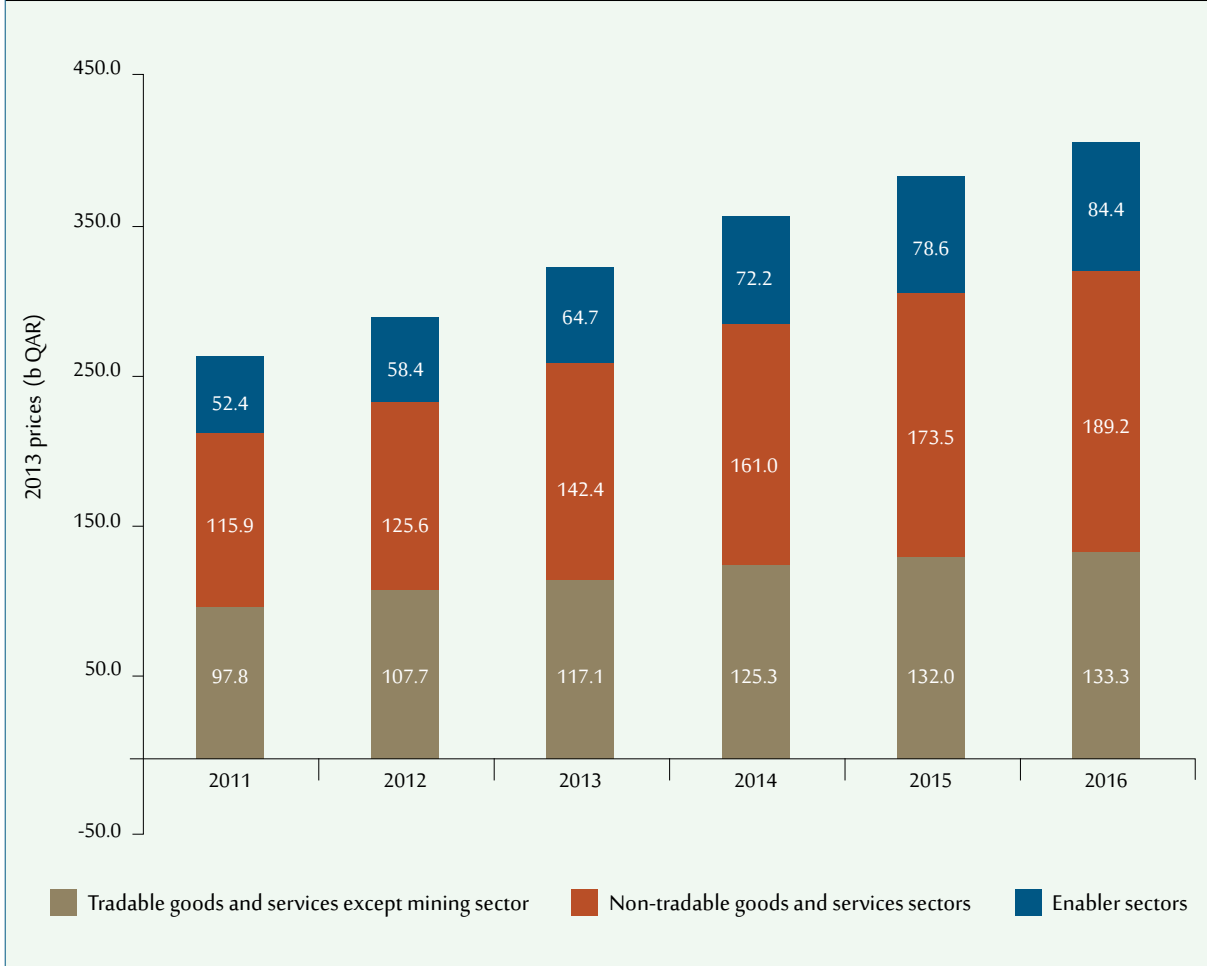
Over the period 2011-2016, Qatar's economic sectors have experienced a clear trend towards economic diversification, supported by the expansion of the public spending and bank credits. The expansion of current and capital spending, a large part thereof was allocated to finance basic infrastructure projects. The FIFA projects, was the cornerstone of the activities of the construction sector and other services. Private investment also has took similar trends, focusing mainly on the real estate sector, which boosted the pace of the construction sector.

The expansion of the nonhydrocarbon economy focused on developing economic sectors that provide essential services to another sector (called enabling sectors). The real output of non-tradable goods and services (NTGS) sector grew at an average annual rate of 10% and 10.3% respectively over 2011-2016 (Figure 3.2.2).

While the expansion of the nonhydrocarbon sector - enabling sectors - was a result of public spending, the expansion of the NTGS sector was driven by the growing needs of the population whose number grew significantly in line with the requirements of the construction sector activity.

The credit policies have encouraged the private sector to finance their development projects by getting loans from domestic banks. The compound annual growth rate (CAGR) to the private sector was 14.6% compared with a 2.2% decline in the CAGR of the nominal GDP during 2011-2016.

Figure (3.2.2): The Real GDP of the nonhydrocarbon sector



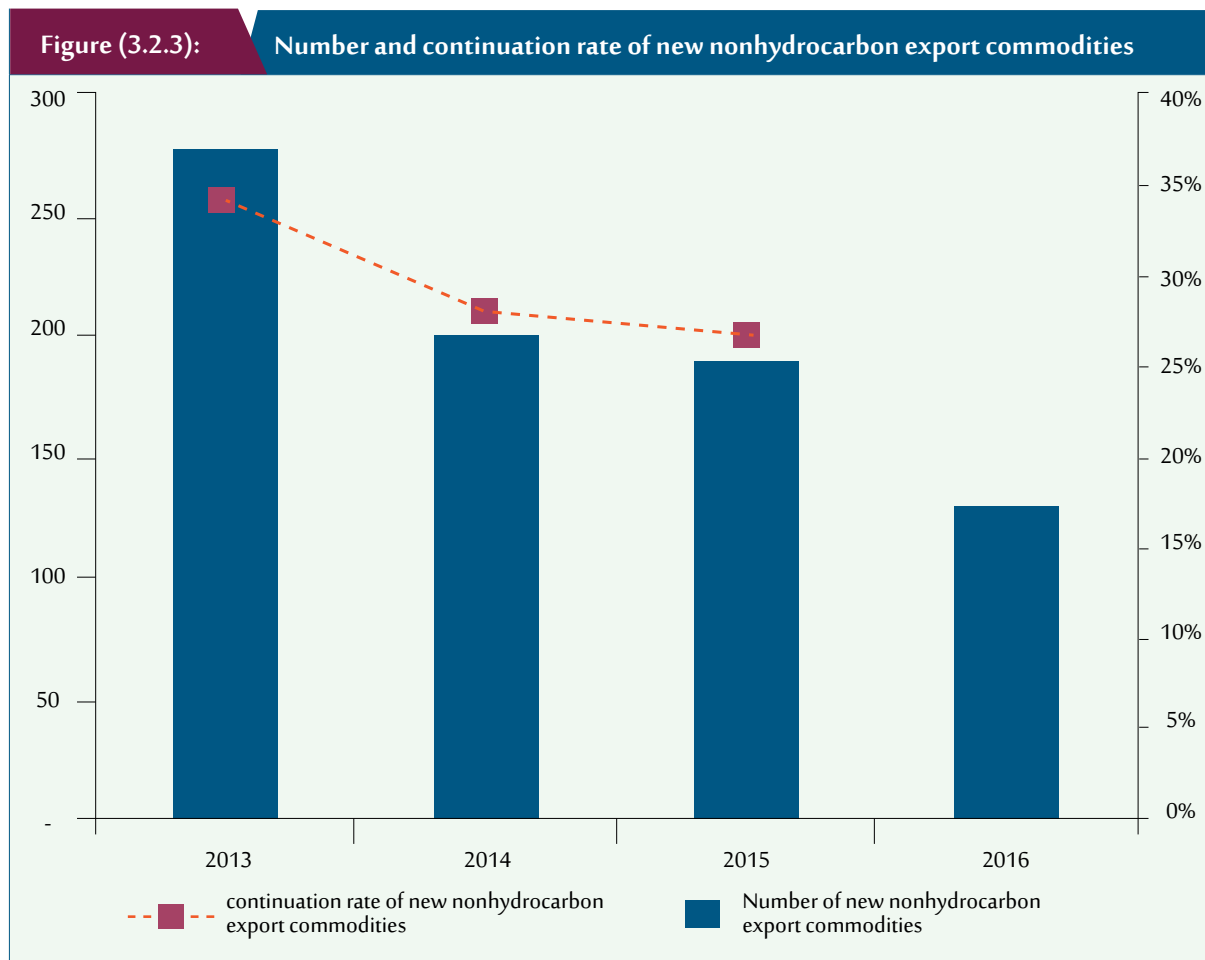
Source: MDPS

Note: Enabler sectors include activities of facilities, transport and storage, communications and information, and finance. The sectors of goods and traded services (excluding mining) include agriculture and fishing, manufacturing, professional services and wholesale and retail trade. Non-traded goods and services include construction, housing, food, administrative and other services.

It is a fruitful policy that Qatar has focused its development projects during 2011-2016 on accumulating a capital formation (capital stocks and assets that are used in production processes such as infrastructure, factories, machinery, etc.) It is economically well-known that capital formation always paves the way for a significant expansion and growth of the nonhydrocarbon sector. However, poor performance of nonhydrocarbon exports may threaten economic diversification process.

In spite of the massive investment in the domestic export-supporting infrastructure, the CAGR of re-exported goods (produced abroad with small added value to the Qatari economy) at 7.4% during 2011-2016 exceeded that of locally produced exports (0.6%). The number of new exported commodities also more than halved over the period 2013-2016, in addition to a gradual decline in the rate of exports of new goods (Figure 3.2.3)⁴⁷. However, it is encouraging that the average value of exports of new goods increased by almost 2.5 times over the same period as a result of energy-based chemical transformation products, suggesting increased production and export of high-value-added products.

⁴⁷ This indicator measures the continuity of a new commodity exported in the year following its first exporting year. It equals the number of new exported goods that continue in a future year, divided by the number of new exported goods in the study year.



Source: MDPS, Foreign trade statistics

However, there are promising and encouraging signs in increasing the exports of the service sector given that the Qatar's plans during 2017-2022 are to pursue opportunities in this wide-range sector of service. The service exports grew at an average annual rate of 15.8% during 2012-2016, driven mainly by the transport sector that grew at an average annual rate of 14.1%, mostly as a result of the Qatar Airways activity. However, as in merchandise exports, the private sector activity in service exports is still lagging behind that of the State-Owned Enterprise (SOEs).

The overall outlook of the Qatari economy (as discussed in Part 1, Chapter 2) shows an increase in the economic diversification. However, diversification process is still unsustainable and risked to be slowed and stumbled because the enablers of expanding the Nonhydrocarbon sector (mentioned above as catalyst for diversification) are expected to slow during 2018-2022. Also, public expenditure is expected to be managed more efficiently during the period of NDS-2 (2018-2022).

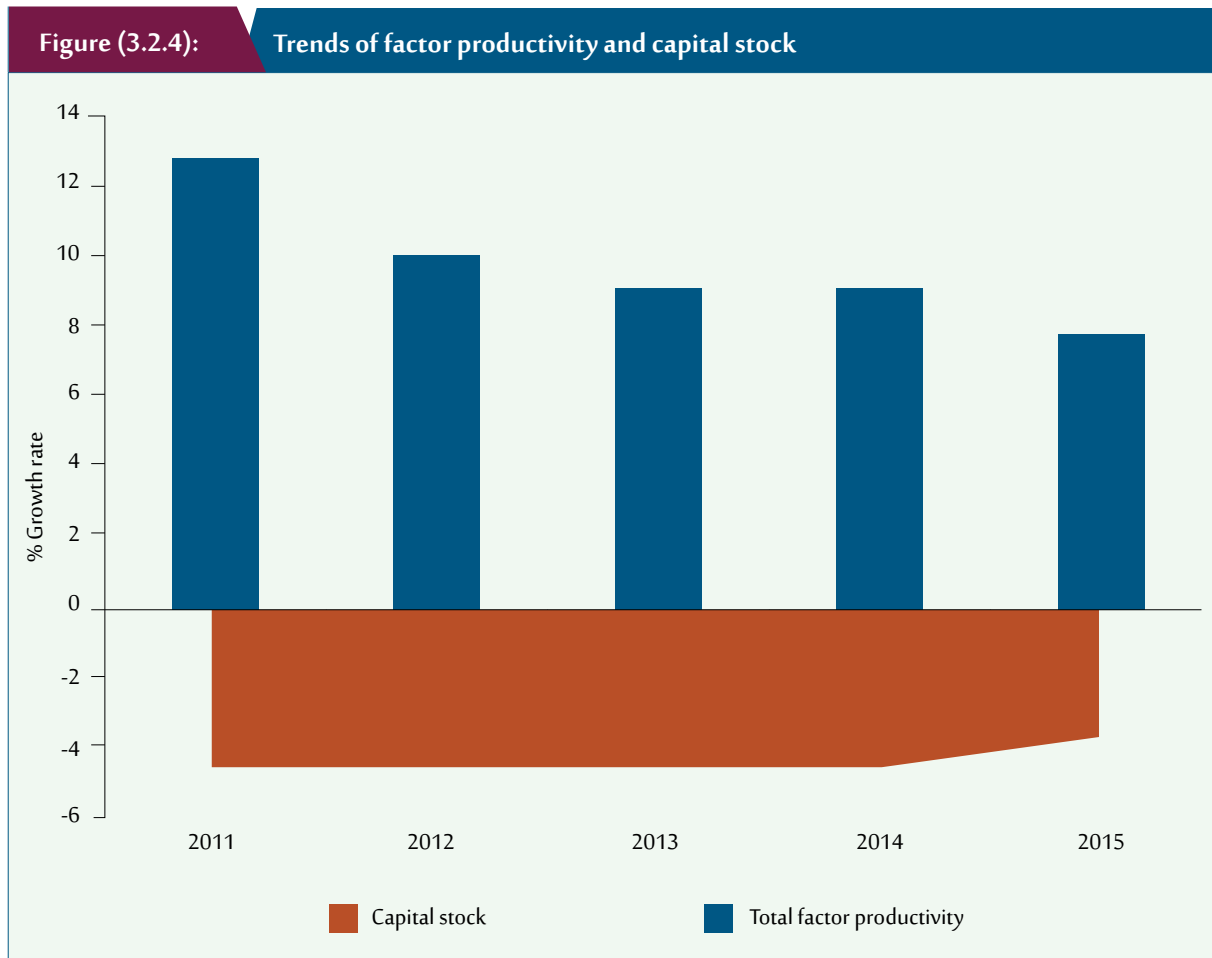
The public investment expenditure is expected to peak during the second half of the forecast period, which also means the need for expatriate labours, will decline and therefore and overall demand for services will decline .

Developing private sector for economic diversification process requires enormous finance. However, banking credit facilities to the private sector during the NDS2 period are expected to slow down due to the anticipation of limited bank liquidity as well as the impact of continued efforts to meet Basel III requirements which may discourage bankers from providing loans to the private sector. Conversely, policy, institutional and administrative reforms would improve business climate which in turn would increase private investment.

The total factor productivity (TFP) – which reflects the production growth not attributable to traditional inputs (physical and human capital) or to changed production yields, but to other factors, such as efficiency, technical progress, effectiveness, innovation, research and development, governance and institutionalism – was negative during the NDS-1 (Figure 3.2.4). The growth of capital stock (capital formation), albeit at varying (and decreasing) rates during 2011-2015, was not accompanied by improved TFP.

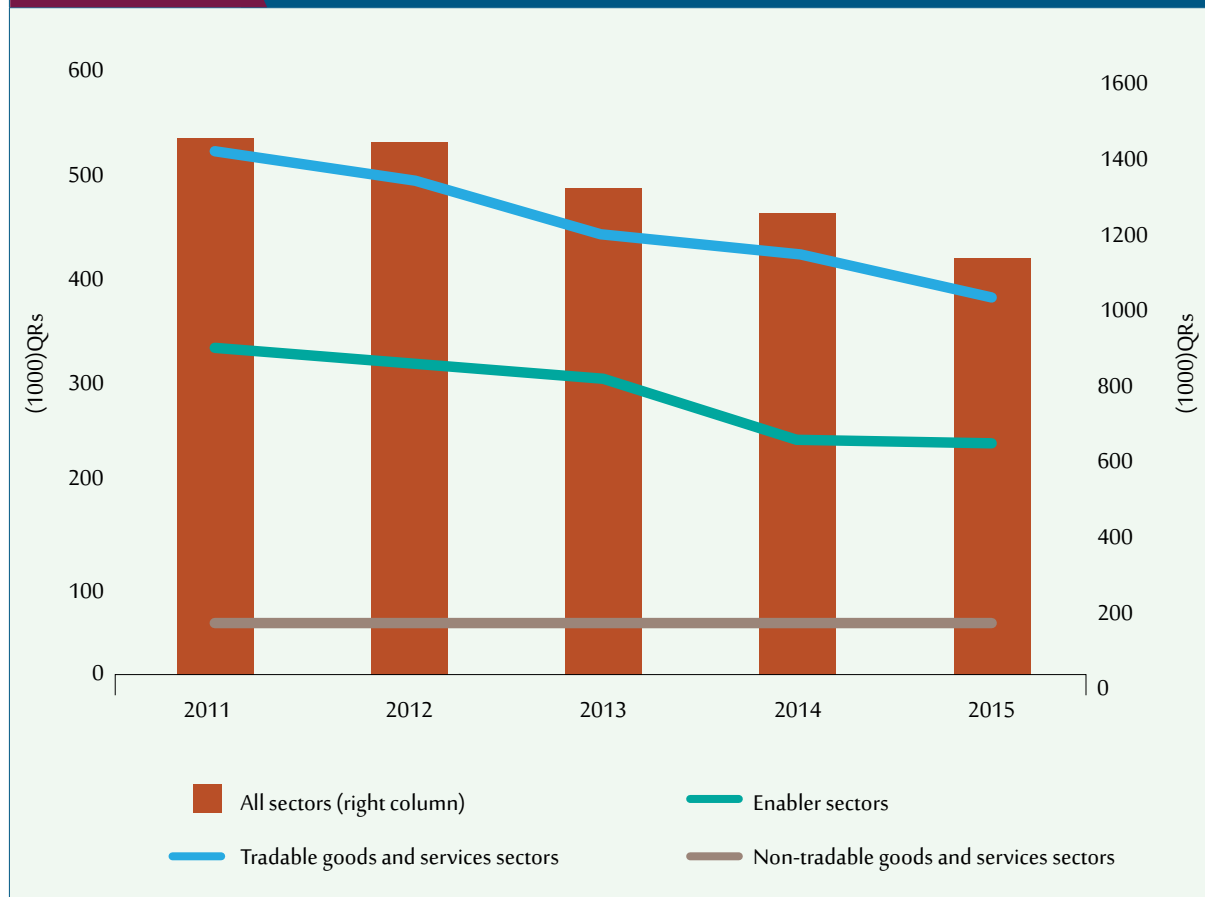
In order to consolidate, sustain and entrench the growth path, productivity must be enhanced and increased. The decline in labour productivity in the non-tradable goods and services (NTGS) during 2011-2015 was less clear as these sectors benefited from the significant additions of capital stock. With these new additions, labour productivity rates are likely to increase over the period 2018-2022.

In contrast, labour productivity in the enabling sectors and tradable products and services declined by 29.9% and 27.4% respectively during the same period (Figure 3.2.5). Given this decline, it is very important for export companies to take initiatives to enhance the efficiency and productivity of their human capital. It is necessary to address and reverse the declining productivity in the Qatari economy. Improved productivity helps reduce costs and prices, which in turn reduces the real effective exchange rate (i.e. the real exchange rate of the Qatari riyal against the currencies of Qatar’s trading partners) which improves Qatar export competitiveness without changing the nominal exchange rate which is pegged to the USA dollar and therefore it is considered as fixed exchange rate for Qatar.



Source: WB, EDPSP Report database

Figure (3.2.5): Labour productivity levels



Source: MDPS

Note: To see sector classifications, please refer to the first figure in the section. Productivity was calculated using real GDP.

The NDS-1 gave great importance to the EDPSD. It identified a range of interventions aimed at strengthening the business environment and market efficiency, supporting the private sector and entrepreneurship, improving discovery and innovation capacities and skills, increasing productivity, attracting talents and high skills, improving ICT quality, and expanding the financing activities.

To achieve the agenda of the NDS-1, thirteen (13) targets were laid out to measure the progress of economic diversification on various themes during 2011-2016. Of those 13 targets, three of them were selected to strengthen the private sector and promote entrepreneurship as follows:

- Activate the working agenda of the Enterprise Qatar (EQ)
- Qatar Development Bank (QDB) to provide new products and services that will expand its scope and functions
- Reform of legislation on government procurement to reduce the burden SMEs

Significant progress was made towards the achievement of those three targets. The first two targets were achieved by expanding and activating their development objectives and business roles via merging the EQ to the QDB. Such merger has allowed the new QDB to expand its scope of work and the number of its products and miscellaneous services to support the

private sector and entrepreneurs. Concerning the third target, a new Government Procurement law was enacted in 2015, and it took effect in June 2016.

The progress toward achieving the targets of increasing the capacities and skills of discovery and innovations was uneven and varied. The slow pace indicates to more efforts need to be made to foster invention and innovation to facilitate the transition of Qatar to a knowledge-based economy

Regarding the progress toward fulfilling the target of the “Develop a national strategy for research and development linked to technology transfer” has begun by designating the Qatar Foundation (QF) to implement this target by undertaking the research and studies necessary to support Qatar’s development process.

The target of “Establish an incubator for knowledge businesses at the Qatar Science and Technology Park” was completed and the QSTP became a major incubator for the development of technology and support for research and development efforts in Qatar.

With regard to the target “Establish a Public-Private Partnership (PPP) Framework to support development of a knowledge-based business sector,” progress was achieved towards establishing and strengthening public-private partnerships. A draft PPP Law governing the relationship between the two sectors has been finalized and is currently under the process to be approved.

In addition, the development of the PPP technical framework and operational model as well as related policies have been finalized and are waiting the enactment and approval of the PPP Law. A number of PPP-based projects have also been initiated in the education, health and tourism sectors. A senior steering committee and a technical committee have been established led by the MEC with the membership of a number of stakeholders to develop appropriate PPP frameworks and programs in Qatar.

To support the private sector and increase its role in economic development, Qatar launched several strategic initiatives for food security, logistics, warehousing and tourism. The MEC plays a supervisory role in implementing these initiatives in coordination with government entities to open new investment sectors and opportunities to motivate and engage the private sector.

With regard to strengthening the Information Communication Technology (ICT) sector to serve economic development, the target “Approve and execute the Supreme Council of Information and Communication Technology strategy” was achieved following the finalization and approval of the ICT Strategy and a number of detailed strategies and sub-plans contained therein were implemented to upgrade the ICT sector to meet the needs of the national economy.

In the context of expanding the activities of the financial sector as an essential player in the development process of the national economy, the target of “Implement Qatar Financial Centre Authority strategy, and scale up the activities of the Qatar Business Financial Academy” was fully achieved. The Qatar Financial Center Authority (QFCA) has successfully attracted a large number of financing companies to register with its system (reaching 307 licensed companies until June 2016).

Four targets were chosen identified as measurements indicators to improve the competitiveness of the Qatar economy and to enhance the market efficiency of the market and business environment. (1) effective implementation of the existing Competition and Investment Law, 2) the continuation of liberalizing investment management process to encourage the Foreign Direct Investment; (3) streamlining business and trade rules and regulations so that to achieve significant improvement in the World Bank’s Doing Business indicators; and (4) expanding the liberalization of service trade activities.

Despite the organizational and procedural challenges facing the implementation of the first three objectives, a significant progress has been made. As for the target on competition, the MEC drafted a new Competition Law and submitted it to the higher authorities for study and approval. The MEC also conducted several analyses on the competition situation of many priority economic sectors and the initiation of the liberalization of some of them like vehicles (spare parts, maintenance and warranty), food, basic materials, and brokerage. Two MEC committees were also established; once called the Protection of Competition and Prevention of Monopolistic Practices Committee and the other is called the Pricing and Profit Setting Committee.

As for the FDI target, initiatives are under consideration, including the development of policy and program proposals to identify the FDI promotion opportunities, especially in the nonhydrocarbon sector. Also, the services provided to foreign investors are being considered and modernized.

With regard to the target of improving Qatar rankings in the indicators of “Doing Business”, a series of initiatives aimed at developing and strengthening the business environment were implemented, including the promulgation of a new Commercial Companies Law; the completion of the process of revising, streamlining and transforming 51 procedures and steps of business establishment into online and mobile services; and abolishing the minimum capital requirement of QAR 200,000 for business establishment.

As for the target of liberalizing the service trade, the program was postponed until 2017 due to a lack of budget. However, it is very important to note that it has been implemented indirectly given that Qatar has already become a member of the World Trade Organization Information Technology Agreement for the liberalization of trade in IT services and products.

With respect to enhancing land use to support the national economy and competitiveness, in particular achieving the target “Establish well serviced and efficiently managed and regulated special economic zones for industrial land,” the MEC established the Economic Zones Company (Manateq) to oversee the special economic zones in Qatar. The first two economic zones were launched in 2015 in Abu Fintas and Umm al-Houl with an area of 4 and 34 square kilometers respectively. The third zone is scheduled to open in 2018 in Karaana. The Council of Ministers and the Shura Council have approved a draft Economic Zones law that will regulate these zones, pending its promulgation.

3. Challenges facing the EDPSD sector (2018-2022)

The EDPSD in Qatar faces a range of challenges, including: (i) a range of policy shortcomings which limit the ability of the private sector to enter, compete and grow in the domestic market efficiently and effectively; (ii) market failures hinder the expansion of private sector activity into new sectors; (iii) a group of obstacles entrepreneurs from market entry due to either lack of financial resources, basic utility services or lack of institutional and regulatory authorities to make decision in favor of new entrepreneurs. The above issues constitute cross-cutting challenges to the process of economic diversification in the Qatari economy.

Current policy shortcomings limit opportunities for economic diversification and private sector development. The persistence of certain oligopolistic practices of the Qatari economy is detrimental to competition conditions and leads to higher prices and lower quality of services to consumers and the business sector alike. The existence of a group of companies that monopolize the import and distribution of certain categories of trademarks and brands severely restricts the conditions of domestic competition. Other policy failures which increasingly dissuades investors from entering the Qatari market are lack of

bankruptcy laws, cumbersome regulatory procedures and a slow legal and ineffective litigation system. These policy failures enforce the private sector to channel its talents and resources towards less productive but more profitable investments.

Market failures prevent the development of private sector and limit its role in the Qatari economy. Currently, government is the largest client of the private sector, directly or indirectly. Non-traded services provided by the private sector account for the bulk of government consumption. This leaves the private sector almost no incentives to expand to traded goods where risk is higher and international competition is greater. Also, the business sectors in Qatar experienced coordination and harmonization failures. The investment of one company is feasible if a parallel investment of another company exists. Without an effective market size and activity, new providers will refrain from entering the market. This is apparent in the highly technical and complex activities in which Qatar has made great strides through its state-owned enterprises or partnerships with others, such as the Qatar Science and Technology Park and the Qatar Genome Programme.

In addition to the deficiencies in the harmonization of the domestic market, there is a lack of regional coordination, especially between SOEs and government-led activities. Instead of coordination among the GCC States to achieve optimal outcomes for all, they compete with each other in organizing international exhibitions and in airlines, aluminum, iron, basic petrochemical products and plastics.

The activities of the enabling sectors are not meeting all the needs of Qatar's economic sectors, or sometimes are missing. Despite significant public spending on the ICT and utility sectors, access to their products is still limited and very costly, which constrains the growth of other sectors of the local economy. While there are a large number of banks in Qatar, SME entrepreneurs face difficulties in accessing finance. The business environment is also preferential for those who are already in these sectors and it discourages new entrants.

4. EDPSD Main outcome, intermediate outcomes and targets (2018-2022)

Advancing EDPSD efforts requires an integrated and comprehensive approach to a set of specific outcomes, targets and performance indicators that would shape the next phase of EDPSD. The below set of outcomes and targets reflect the lessons learned from the NDS-1 and its progress. They aim to strengthen and sustain the EDPSD path and enhance its contribution to the Qatari economy, which is a theme of the economic development pillar of QNV 2030.

Main outcome

“A more competitive, productive and diversified economy and a more dynamic private sector with greater contribution to the national economy” In order to achieve the main outcome, the following intermediate outcomes and objectives have been identified:

Intermediate outcome 1: Increase share of nonhydrocarbon sectors contribution to GDP driven by key priority sectors

A major pillar of economic diversification is diversifying the GDP structure towards greater participation of nonhydrocarbon activities, especially in sectors with high potential and strengths that enable them to drive the nonhydrocarbon economy and support economic diversification. Therefore, the following two targets have been identified:

- **Target 1:** Develop and coordinate priority sectors strategies (manufacturing, professional and scientific activities, logistics, financial services, tourism and ICT) in 2018

- **Target 2:** Direct and enable the workforce required for the growth of priority sectors during the period 2018-2022

Intermediate outcome 2: Enhance productivity levels across priority sectors

Improving productivity is very important to boost GDP growth and expand the production base, especially in priority sectors that can drive the growth of the nonhydrocarbon economy. Thus, the NDS-2 identifies the following two targets:

- **Target 1:** Nurture workforce capabilities to achieve labor productivity improvement during 2018-2020
- **Target 2:** Identify, encourage and facilitate optimization opportunities to achieve operational competitiveness in priority sectors over 2018-2022

Intermediate outcome 3: Increase size and share of exports of nonhydrocarbon goods and services

This outcome aims at developing exports of nonhydrocarbon goods and services, which supports the current account and diversifies the production base, income sources and foreign reserves. To measure progress towards the intermediate outcome, the following two targets have been identified:

- **Target 1:** Develop a robust, high-standard end to end supply chain that enhances Qatar's export competitiveness during the period 2018-2022
- **Target 2:** Cultivate Qatar's market positioning in the regional and global context to promote export competitiveness during the period 2018-2022

Intermediate outcome 4: Increase private sector contribution to GDP

To achieve this outcome that enables the private sector to play an important role in economic diversification, the NDS-2 defines the following targets:

- **Target 1:** Establish an enabling cross-sector ecosystem that facilitates business establishment and operational success over the period 2018-2020
- **Target 2:** Establish mechanisms to effectively leverage private sector efficiency in driving Qatar's economic development over 2018-2019
- **Target 3:** Promote Qatar as a haven for investors during 2018-2022

Intermediate outcome 5: Promote Vibrant entrepreneurship and innovation culture, especially among Qatari nationals

Given the importance of supporting entrepreneurship and the capacities of creativity and innovation in facilitating the transition to a knowledge-based economy, which in turn enhances economic diversification efforts, the following two targets have been identified:

- **Target 1:** Promote entrepreneurship in priority sectors and enable the SME sector to grow and compete during the period 2018-2022

- **Target 2:** Foster innovation development, adoption, and localization within priority sectors over the period 2018-2019

Intermediate outcome 6: Strengthen positioning of Qatar as a regional hub for priority sectors

This intermediate outcome is important because it enhances the regional presence of Qatar as a privileged and competitive incubator for priority sectors. In this regard, the NDS-2 identifies the following targets:

- **Target 1:** Establish state of the art infrastructure that enables Qatar to become a focal point for select economic and research activities over the period 2018-2019
- **Target 2:** Focus and coordinate national efforts to achieve excellence in research during the period 2018-2022
- **Target 3:** Build international recognition and strengthen partnerships relevant to Qatar's research and priority sectors over the period 2018-2022

5. Conclusion

EDPSD is very important for enhancing the sustainability and prosperity of the local economy through diversifying the available nonhydrocarbon sources of income and production base. There was some progress towards economic diversification during the NDS-1, but most of it was concentrated in the NTGS sector. In order to move forward with economic diversification, efforts must be focused on building the foundations of a knowledge-based economy, increasing productivity, enhancing competition, improving the business environment, encouraging the domestic private sector and attracting foreign investment to priority sectors. To achieve the foregoing; policy, regulatory, legislative and procedural reforms must be undertaken, while optimally utilizing and framing tangible and intangible assets available in the local economy to drive economic diversification efforts forward.

6. Annex

Intermediate outcomes, targets, interventions and implementing agencies that contribute to the main outcome “A more competitive, productive and diversified economy and a more dynamic private sector with greater contribution to the national economy”

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
Intermediate Outcome 1: Increase share of nonhydrocarbon sectors contribution to GDP driven by key priority sectors	1.1 Develop and coordinate priority sectors strategies (manufacturing, professional and scientific activities, logistics, financial services, tourism and ICT) in 2018	Coordinate and develop a detailed national manufacturing strategy during 2018	MEC	Manufacturing Strategy Development Group (MoEI and EZC)
		Develop the strategy to grow the financial sector in Qatar during 2018	QCB	MEC QFC
		Develop the strategy for professional activities in Qatar during 2018	MEC	QDB QFC QF
		Develop the strategy for scientific activities during 2018	QF	MoTC MEC MEHE
		Review and update the National Tourism Strategy during 2018	QTA	Ministry of Culture and Sports

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
		Develop Qatar's logistics strategy during 2018	MEC	MoTC Qatar Ports Management Company (Mwani) HIA GAC EZC Qatar Airways
		Develop an ICT Sector Strategy during 2018	MoTC	QF QDB
		Set up national cross-sector coordination mechanisms to capture synergies and ensure alignment of the different strategies during 2018	MEC	EZC QCB QTA MoTC QF

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
	1.2 Direct and enable the workforce required for the growth of priority sectors during the period 2018-2022	Increase academic and career guidance programmes during the period 2018-2022	ADLSA	QDB QFC MoI MEC EZC QCB QTA MoTC QF
		Build on recent labor market reforms and introduce demand-based policies that facilitate attraction and retention of talented labor with required specialized skills during the period 2018-2020	ADLSA	MoI

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
<p>Intermediate Outcome 2: Enhance productivity levels across priority sectors</p>	<p>2.1 Nurture workforce capabilities to achieve labor productivity improvement during 2018-2020</p>	<p>Develop initiatives and incentives for sustainable professional development over the period 2018-2019</p>	<p>ADLSA</p>	<p>MEHE QCB MEC EZC QTA MoTC QF</p>
		<p>Develop knowledge transfer mechanisms during 2019-2020</p>	<p>MEC</p>	<p>MEHE ADLSA QDB QFC MoEI EZC QCB QTA MoTC QF</p>

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
	2.2 Identify, encourage and facilitate optimization opportunities to achieve operational competitiveness in priority sectors over 2018-2022.	Promote optimization along the value chain over 2019-2022	MEC	EZC QCB QTA MoTC
		Implement research programmes in priority sectors and key areas and develop research incentives and funding mechanisms to build a competitive advantage and increase productivity over 2018-2022	QF	QDB
Intermediate Outcome 3: Increase size and share of exports of nonhydrocarbon goods and services	3.1 Develop a robust, high-standard end to end supply chain that enhances Qatar's export competitiveness during the period 2018-2022	Build on recent improvements in infrastructure and logistics services that play a direct role in building Qatar's exports competitiveness over the period 2018-2022	MEC	MoTC Ashghal Qatar Ports Management Company (Mwani) HIA GAC EZC Qatar Airways

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
		Activate regional and international networks to establish a more expansive and competitive supply chain during 2018-2020	MEC	MoTC Ashghal Qatar Ports Management Company (Mwani) HIA GAC EZC QA
	3.2 Cultivate Qatar's market positioning in the regional and global context to promote export competitiveness during the period 2018-2022	Set up relevant regional and international trade agreements which can enhance Qatar's positioning in key markets over 2018-2022	MEC	Ministry of Foreign Affairs Qatar Chamber of Commerce
	4.1 Establish an enabling cross-sector ecosystem that facilitates business establishment and operational success over the period 2018-2020	Continue to promote an exemplary enabling business environment during the period 2018-2020	MEC	MOJ QDB QFC Mol MME QTA

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
<p>Intermediate Outcome 4: Increase private sector contribution to GDP</p>		<p>Identify emerging economic cluster opportunities to improve competitiveness across different sectors and develop the required operating model and regulatory framework over the period 2018-2019</p>	<p>MEC</p>	<p>EZC QDB QFC QP HIA GAC QA Ministry Of Energy And Industry Supreme Committee for Delivery and Legacy</p>
	<p>4.2 Establish mechanisms to effectively leverage private sector efficiency in driving Qatar's economic development over 2018-2019</p>	<p>Develop Qatar's privatization roadmap during 2018-2019</p>	<p>MEC</p>	<p>QCB QTA MoTC QF QDB QFC</p>

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
		Develop Qatar's overarching PPP roadmap, legislation, and institutional setup over 2018-2019	MEC	QCB QTA MoTC QF MOEI QDB QFC
	4.3 Promote Qatar as a haven for investors during 2018-2022	Develop incentive packages and an attractive legal and regulatory framework for foreign investors to establish presence in Qatar during 2018-2019	MEC	QDB QFC MoI MEC EZC QCB QTA MoTC QF

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
		Nurture and incentivize local investors and direct them to opportunities in select sectors over 2018-2022	MEC	QDB QFC MoI MEC EZC QCB QTA MoTC QF MOEI
Intermediate Outcome 5: Promote Vibrant entrepreneurship and innovation culture, especially among Qatari nationals	5.1 Promote entrepreneurship in priority sectors and enable the SME sector to grow and compete during the period 2018-2022	Promote entrepreneurship particularly among locals and empower startups over the period 2018-2022	QDB	MEC QF ADLSA MEHE Qatar Business Incubation Center Social Development Center (Namaa)

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
		Continue efforts to support SMEs beyond early entrepreneurial stages towards long-term sustainability over 2018-2022	QDB	MEC Social Development Center (Namaa) MOJ EZC QCB QTA MoTC QF MOEI
		Support the internationalization of SME products and services to enable them to compete in the regional and global economy during 2018-2022	QDB	MEC QFC Qatar Ports Management Company (Mwani) HIA GAC
	5.2 Foster innovation development, adoption, and localization within priority sectors over the period 2018-2019	Set up the national strategy and operating model to support innovation, particularly in priority sectors, during the period 2018-2019	QF	MEC QDB

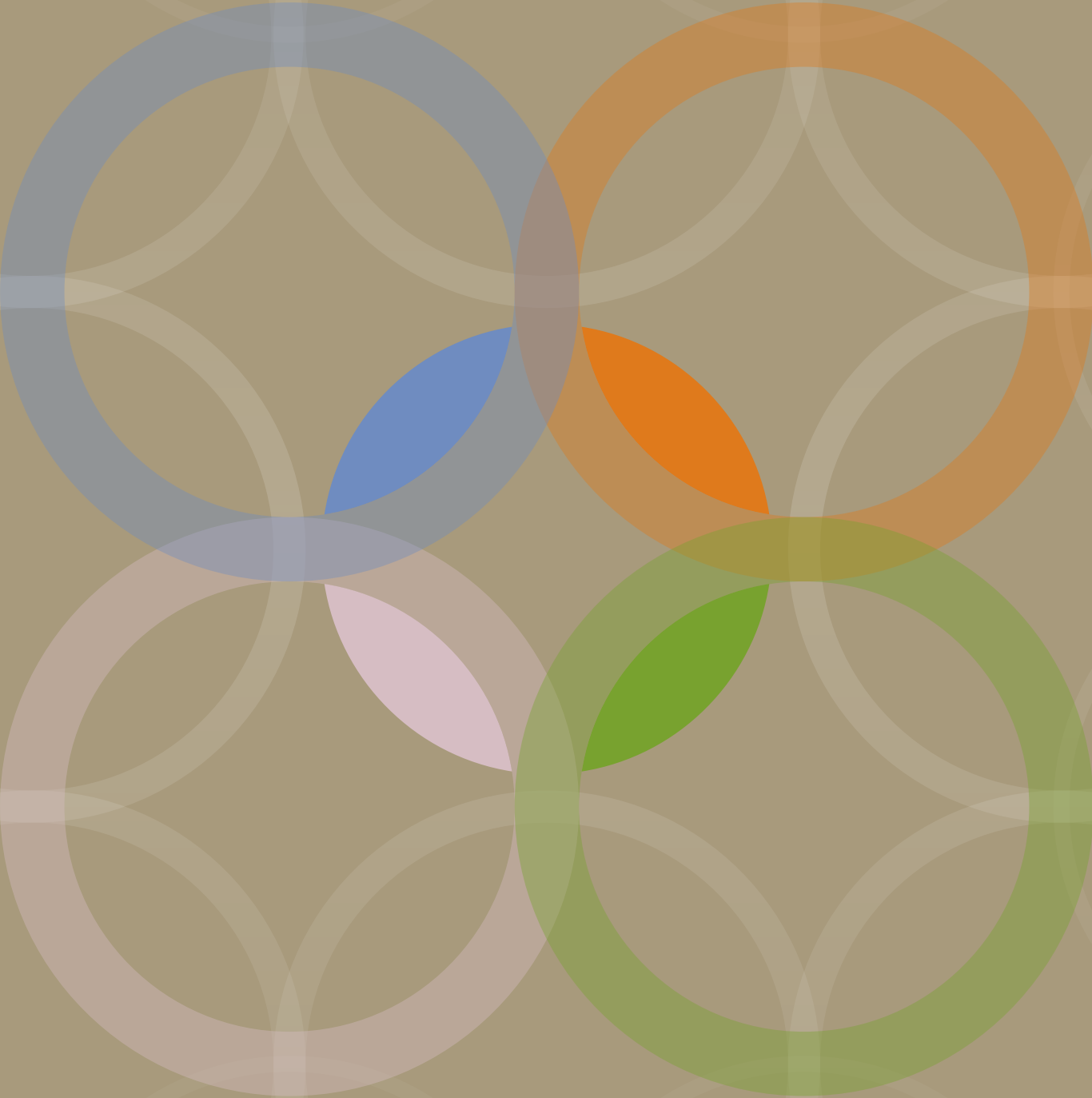
Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
<p>Intermediate Outcome 6: Strengthen positioning of Qatar as a regional hub for priority sectors</p>	<p>6.1 Establish state of the art infrastructure that enables Qatar to become a focal point for select economic and research activities over the period 2018-2019</p>	<p>Build on recent improvements made in order to achieve consistent, high-speed communications, reliable utilities and robust transport infrastructure that are key to enabling priority sectors over the period 2018-2019</p>	<p>MoTC</p>	<p>MEC MoEI EZC Qatar Ports Management Company (Mwani) GAC QA QDB QFC MME Ashghal QCB QTA QF</p>
	<p>6.2 Focus and coordinate national efforts to achieve excellence in research during the period 2018-2022</p>	<p>Establish shared research database and platforms and develop coordination mechanisms to optimize synergies and use of resources across Qatar's research entities during 2019-2020</p>	<p>QF</p>	<p>MEHE QDB QFC MEC</p>

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
		Increase national focus on developing and commercializing intellectual property (IP) over 2018-2020	MEC	QDB QF
		Collaborate with key international organizations and consortia and host and participate in global research conferences to enhance Qatar's global positioning in research during the period 2019-2022	QF	MEC QDB
	6.3 Build international recognition and strengthen partnerships relevant to Qatar's research and priority sectors over the period 2018-2022	Develop strategic partnerships and alliances that strengthen Qatar's value proposition and competitiveness across priority sectors over the period 2019-2022	MEC	EZC QDB QTA MoTC QF
		Coordinate branding, marketing and promotional efforts within and across key sectors during the period 2018-2022	MEC	EZC QCB QTA MoTC QF

Part III: Sustainable Economic Prosperity



Chapter III: Natural Resource Management

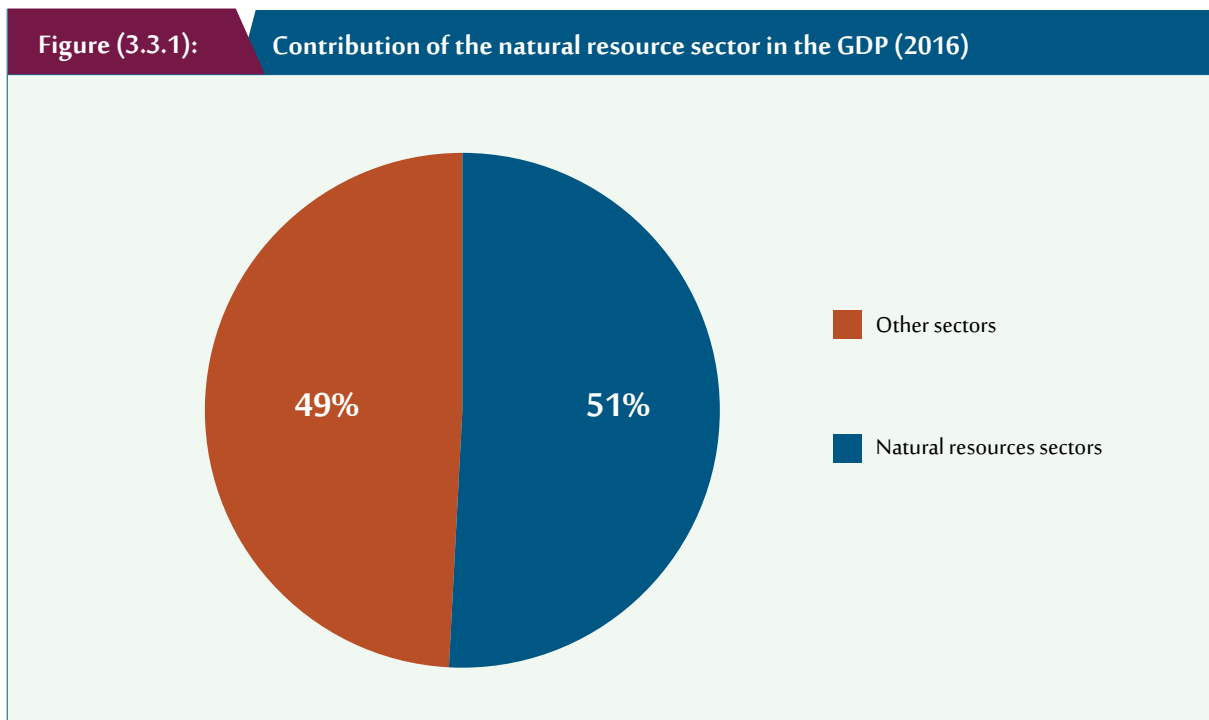


1. Introduction

This Chapter deals with the natural resource management which requires to protect water resources, to rationalize the use of energy, to work toward utilizing the renewable energy resources, to increase the rates of self-sufficiency of agricultural and fishery products, and to use the hydrocarbon resources optimally. Such requirements would protect the natural resources of the State of Qatar from the pressures created by the high explosion of population growth.

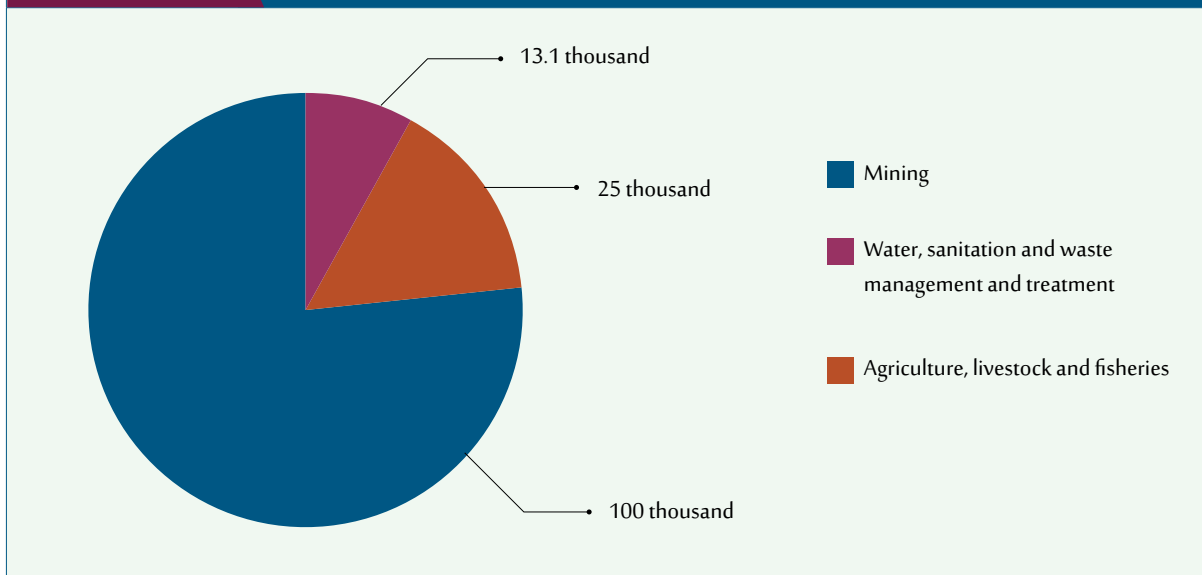
The Natural Resource Management (NRM) Sector Strategy sets out the overall direction for the management of the sector and emphasizes the main outcome **“Optimize and sustain natural resources for the people of Qatar”** that remains relevant to the goal of the current strategy. This can be fulfilled by achieving six intermediate outcomes through the achievement of 14 targets. Two targets are for the water sector, two for the renewable and non-renewable energy sector, and three targets for the vegetation plants, fish, and animal production to increase food self-sufficiency so that to support the national economy and enhance food security. Also, there are seven targets allocated for the management of the hydrocarbon sector.

The importance of the natural resource sector stems from its contribution to GDP components and growth. In 2016 (in 2013 constant prices), oil and gas contributed about 49.5% of GDP (Figure 3.3.1) with an added value of QAR 394.4 billion, the electricity and water sector contributed nearly 0.5% of GDP with an added value of some QAR 3.7 billion, while the contribution of the agriculture, livestock and fishery sector was weak (around 0.1% of GDP) with an added value of only QAR 1.02 billion. This means that the NRM sector contributed about half of the GDP in 2016. Qatari exports of oil and gas accounted for 85% of total exports in 2015 (57.7% for gas and 27.4% for crude oil).



Source: MDPS: (1) National Accounts Bulletin 2016; (2) QCB, Quarterly Statistical Bulletin, September 2016

Out of the nearly two million workers in Qatar in 2016, the mining sector alone employed around 100,000 workers (Figure 3.3.2); the water, sanitation and waste management and treatment sector absorbed about 13,100 workers, and the agriculture, livestock and fishery sector employed approximately 25,000 workers. This indicates that this sector is not labour-intensive since it as a whole only employed nearly 7.4% of the entire labour market, which is a limited contribution.

Figure (3.3.2): Natural resource sector's contribution to the labour force (2016)

Source: MDPS, Labour Force Statistics Bulletin 2016

2. Progress towards achieving NRM sector outcomes and targets (2011-2016)

The natural resource sector in the NDS-1 included two pillars: enhancing economic and technical efficiency and promoting market efficiency. Six outcomes focus on improving water resource management (7 targets), promote energy and gas efficiency outcome (6 targets), improve land-use efficiency (one target: "Achieve sustainable improvements in agricultural productivity outcome"), (4) establish the Sustainable Fishery Resource Programme outcome (one target), enact legislation as one target to legalize the management of natural resources outcome, and price the use of energy, water, and fuel with optimal price as one target.

The total number of natural resources management targets was 17, in addition to the first sectoral outcome in the Environmental Sustainability Chapter on clean water and sustainable use, which includes three additional environmental targets: the National Water Act, monitor groundwater, and reduce natural gas flaring and emissions. Five targets were achieved, and significant progress was made on nine of the 17 NRM targets).outcome.

For the outcome of enhancing water management, the rate of water leaking (non-revenue water) from desalinated water was reduced to 10% in 2015 (4.7% of which was real losses from leaking, and less than 6% was administrative losses)⁴⁸ compared to nearly 30% in 2011. Moreover, the Rationalization law No. 26 of 2008 was amended by the Rationalization law No. 20/2015 to raise the consumer awareness of the optimal use of water resources. Damaged meters were replaced and smart meters are being installed. The installation of modern techniques to properly manage water in schools and Masjids has also been supported and they are being installed in other utilities. Non-traditional water resources have also been used in biosaline agriculture, in addition to extending TSE systems to some 800 km, expanding treatment plants, and completing a study on the construction of an industrial wastewater treatment plant.

Regarding achieving the outcome of energy and gas efficiency, thermal efficiency has been improved in energy production, with accelerated introduction of energy saving techniques. Furthermore, a Green Building Code has been developed and is

⁴⁸ Kahramaa (unpublished data).

being adopted. Its application will be mandatory in the public and private sectors. Also, the establishment of a renewable energy committee has been approved. There are also the following achievements in the oil and gas sector:

- **Production and development:** The total production of oil fields was around 696,000 barrels a day in 2016, in addition to the production line no. 7 of the QatarGas Project (4) with a production capacity of 1.4 billion cubic feet per day. Further, work started in the Barzan Gas Project that aims to produce approximately 1.4 billion cubic feet.
- **Exploration:** The Al Radeef natural gas field was discovered in 2013, and exploratory processes and studies of non-traditional hydrocarbon potential continued.
- **Petrochemicals and refining:** A diversified strategy was implemented for the development of the following natural gas projects: 1) The Pearl Liquefaction Project: It became operational in 2011 and has a daily production capacity of 140,000 barrels of liquid petroleum products of diesel, kerosene, naphtha and base oils. 2) The Laffan Refinery 2: It began commercial production in 2016 with a production capacity of 146,000 barrels per day to produce naphtha, aviation fuel, diesel, and liquid petroleum gas. 3) The Helium 2 Project to extract helium from natural gas with an annual production capacity of 1.3 billion standard cubic feet.
- **Other achievements:** include the opening of a project to recover gas evaporated from cargo tankers, where 88% of the gas evaporated from 989 liquefied natural gas (LNG) tankers was recovered in 2015; a project to remove acid gas in Dukhan and Mesaieed (establishment and development of two units to purify natural gas from sulphur impurities in the Dukhan and Mesaieed industrial zones); spending cuts and revenue improvement with a total value added of QAR 5 billion; and the reconsideration and postponement of some capital projects, saving about QAR 8.5 billion.

For the outcome of improving land-use efficiency, initiatives were launched to improve agriculture productivity. To enhance market efficiency, user fees (tariffs) were harmonized with economic costs, and electricity and water charges were phased-in in October 2015 according to consumption tiers (blocks) so as to better reflect their economic cost. With regard to fuel prices (diesel and gasoline, both regular and super), a monthly price formula was adopted in May 2016 to better harmonize domestic fuel prices with international prices.

With regard to the outcome of the enactment of legislation, the Permanent Water Resources Committee, beside the competent MoEI department, was tasked with the core functions of the establishment of an independent and integrated water and electricity regulator with an integrated water and electricity management approach. This will work to increase coordination among stakeholders and implement strategic policies, strategies and plans using a database on various water resources.

In April 2012, Kahramaa, under the generous auspices of HH the Emir of Qatar, launched a National Energy Management and Efficiency Programme (Tarsheed) to reduce the per capita consumption of electricity and water and lower carbon emissions. By the end of 2016, Tarsheed succeeded in reducing per capita electricity consumption by 18% and that of water by 20%. It has also managed to reduce carbon emissions by 1 million tons annually since 2013.

3. Challenges facing the natural resource sector (2018-2022)

Despite the achievements made, the natural resource sector continues to face a number of challenges. In the area of water sector, the absence of an independent and integrated water and electricity regulator is a challenge that emerged during

the NDS-1. The absence of an integrated management of water resources weakens coordination among stakeholders and prevents the development and enforcement of investment policies, strategies and plans, the preparation of the demand expectations, and the provision of a comprehensive and up-to-date database on various water resources (water resources, uses and future forecasts, and actual size of the freshwater aquifer and water stock therein).

The excessive depletion of groundwater is also a challenge for the agricultural sector, which is due to either the low water tariff or lack of water tariffs coupled with poor monitoring of groundwater extraction in farms. It should be noted that Kahramaa has embarked on the first phase of meter installation at groundwater wells in farms. Hence, the subsequent stages of installation in the remaining farms must be initiated. It is also necessary to impose a tariff on groundwater since it is the last resort in emergency situations, especially since Kahramaa has completed a project to rehabilitate five potable water wells. In addition, the unsustainable consumption of water is high, which requires more management and rationalization programmes.

The focus is often on the supply side and its determinants, including the financial burden on the State budget due to high cost of desalination to cope with the increasing demand, increased use of oil resources in desalination processes and increased use of natural gas in power generation and petrochemicals (industrial uses). It is therefore essential to focus on the demand side and its determinants, including water utilization efficiency, proper management, use of techniques in homes and hotels and installation of smart meters. Finally, emergency situations, pollution of the Gulf waters, natural disasters and wars should be addressed by the construction of water reservoirs sufficient for several days. Kahramaa has started the Me ga Reservoirs Project which will be completed in mid-2019.

In the area of energy, challenges include slow expansion, development, adoption and use of renewable energy sources. In his speech to the Shura Council on November 1, 2016, HH the Emir instructed to develop the locally used energy mix to include renewable energies so that solar energy generates 200-500 megawatt hour. There are also increasing environmental impact of the use of existing water resources (brine resulting from desalination, air pollution caused by water production, increased carbon dioxide emissions, rising surface water levels, and environmental impacts from wastewater treatment plants).

The challenges in agricultural affairs and research include declining agricultural production and failure to develop climate-resilient crops, thus poor contribution to food security. Furthermore, laws and legislation on agricultural production do not keep pace with the country's food security strategies. This is in addition to the poor harmonization of the marketing structure with the growth rate of local agricultural production, and a lack of resources for fodder components. Therefore, there is a need to study how to create non-traditional sources of animal feed and improve the nutritional value of agricultural residues.

In the field of fisheries, challenges include the development of a national programme for the optimum and sustainable exploitation of fisheries in view of the limited fishing areas, the depletion of fisheries and stock, the scarcity of commercial fisheries that contribute to the domestic fish production, the limited availability of some of the necessary equipment and services for fishing vessels in some fishing ports, and a lack of fish manufacturing that contributes to the diversification and expansion of fishery products.

In the area of livestock, the weak contribution of the local herd to food security is a challenge. Therefore, its contribution to self-sufficiency must be increased to 30% for red meat, especially after Kahramaa completed providing the infrastructure for of 3700 farms, which requires the regulatory authority to ensure that the minimum number of livestock is available in each farm. In addition, veterinary services do not cover all farms. There is also a need to provide quarantines and veterinary laboratories at the HIA and the new Doha Port. Finally, the strains of different species of local livestock are not classified, and the animal and plant genetic resources are neither registered nor maintained in Qatar.

In the oil and gas sector, major challenges include volatile hydrocarbon prices due to abundance of supply; fluctuating demand and its impact on State revenues and project economics; reducing operational costs while maintaining the highest standards of operational safety, production efficiency and asset safety; attracting specialized manpower to support the Strategy's implementation; maintaining the leading position of QP in the world market of LNG under an increased supply and lower prices; developing mature fields using state-of-the-art technology while ensuring a high economic return; and maintaining the highest standards of safety, security and environment.

4. Main outcome, intermediate outcomes and targets of the natural resource sector (2018-2022)

Main outcome

“Optimal exploitation and sustainability of natural resources for the people of Qatar ” To achieve this outcome, the following intermediate outcomes and targets have been identified:

Intermediate outcome 1: Sustainable and diversified water resources

Qatar water resources are particularly important given the lack of freshwater bodies like rivers and lakes, and low rainfall. There are only three water resources: desalinated water, groundwater and recycled water, all are inefficient though critical to water security. Desalinated water in 2015 totaled 533 million m³ compared to 362 million m³ in 2010. The production of desalinated water depends partially on oil and gas and causes multiple environmental impacts, which are being monitored by the Ministry of Municipality and Environment. This increase is due to accelerated population growth, lifestyle changes, high per capita income, urbanization, etc.

The real loss in 2015 was - 26.1 million m³ or nearly 4.7% as a result of leakage,⁴⁹ which is one of the best global indicators. To sensitize subscribers on the optimum use of water, a governmental program for rationalization was developed (**The National Program for Conservation and Energy Efficiency "Tarsheed"**).⁵⁰ Such water is mainly used in domestic, government, industrial, construction and commercial sectors.

In 2016, the groundwater consumption rate (319 million m³/year) was higher than the recharge rate from natural renewable resources (217 million m³/year), which represents a yearly depletion rate of 102 million m³/year. Thus, groundwater consumption is five times higher than recharge. Another challenge is low irrigation efficiency due to traditional irrigation methods such as immersion and rare use of modern technologies. A continued over-pumping will affect groundwater and its quality. There are no methods for Groundwater preservation except of installing modern irrigation systems by all farms, using appropriate crops that consume less water, improving irrigation efficiency, controlling wells consumption, increasingly using TSE in agriculture, and accelerating the adoption of the Groundwater Well Drilling Regulation Law.

Recycled water amounted to about 194 million m³ in 2015, at a treatment cost of a quarter of that of desalinated water. Nearly 66.3 million m³ of recycled water were used in agriculture, 31 million in landscape irrigation, and 57.3 million injected into the deep non-freshwater aquifer, in addition to 39 million discharged into lakes.⁵¹ Increasing the production of this type of water requires the expansion of the sewage networks to all areas covered with the drinking water networks

49 Kahramaa and Ashghal, Statistical Yearbook 2015

50 Tarsheed was activated in 2012 to implement the Electricity and Water Management Law No. 26 of 2008 as amended by Law No. 20 of 2015.

51 MDPS, Annual Statistical Abstract, Chapter XI, Environment Statistics, 2015.

(currently the areas covered with the sewerage network is only 65% of the areas covered with drinking water networks), and the development of the TSE supply system and TSE delivery to various current and expected users after making future estimates of water demand. TSE use should be increased in watering landscape and public parks, cultivating fodder, cooling, and washing sand for construction, and any surplus should be injected into groundwater.

A. Enhancing efficient use and conservation of water resources

The consumers' use of water is still not optimal despite the amendment of the Rationalization Act No. 26 of 2008 by Act No. 20 of 2015, as well as through increasing fines, promulgating a Qatari Plumbing Code, applying the rationalization regulations of taps, implementing a plan to stop water losses in the government sector, launching awareness campaigns and initiatives in various sectors, replacing all damaged meters by smart meters and continuing to introduce modern technologies to reduce water loss. The used TSE is only about 56% of all TSE. This rate should be raised to nearly 70% in the near future. Thus, the NDS-2 calls for water resource efficiency and conservation through the following target:

- **Target 1:** Conserve and develop water resources by 2022 by reducing the total (actual + administrative) losses drinking water and reducing per capita water consumption by 15% through the national program "Tarsheed"

B. Sustain potable water

This requires a comprehensive legal umbrella for water. Therefore, a national Water Law has been drafted and its executive bylaws is developed. The continued depletion of groundwater in farm irrigation and the lack of sanitation network coverage (only 65% of the areas covered by drinking water networks are covered by the sanitation network) lead to higher surface-groundwater table in the country. A project to rehabilitate potable groundwater wells has been completed in five fields in the country. Also, a study on injecting desalinated water into the northern aquifer to achieve water security has been conducted. A similar study is being conducted for the southern aquifer recharge and the implementation of projects to develop the groundwater aquifer by 2022.

- **Target 2:** Minimize groundwater depletion and develop the groundwater aquifer by 2020

Intermediate outcome 2: Sustainable and diversified energy resources in the State of Qatar

The electric power needed for desalination in Qatar is produced using natural gas turbines. Thus, part of exportable hydrocarbons is wasted, combined with the environmental impact of CO₂ emissions. Electricity production rose to 41,499 gigawatt/hour in 2015, of which 59% is consumed by household sector and 28.6% by the industrial sector, in addition to losses of 6% and consumption in the generation and desalination stations 6.4%.⁵²

Power losses in households result from using obsolete, energy inefficient and un-labelled refrigerators, washing machines and other appliances in light of the postponed implementation of a decision to prevent the import of high-energy electric appliances. The use of cooling systems that use TSE will also save power. In addition, the observing of the Green Building Code – to be enforced soon coupled with the establishment of an independent and integrated electricity and water sector regulator that acts as an integrated energy efficiency management by the end of 2022, will promote this trend. Thus, reducing per capita electricity consumption and other household uses will reduce losses and enhance energy efficiency. In this context, the NDS-2 (2018-2022) contains the following targets:

⁵² Kahramaa and Ashghal, Statistical Yearbook 2015.

- **Target 1:** Promote integrated water and electricity management by the end of 2022 and reduce per capita electricity consumption by 8% through Tarsheed Programme
- **Target 2:** Provide data on new and renewable energy by 2021

Intermediate outcome 3: A sophisticated plant, animal and fish production system that promotes self-sufficiency and food security

Agricultural land constitutes about 6% of Qatar's area. Therefore, agriculture sector in Qatar has limited land and water resources and faces difficult climatic and environmental challenges, not to mention low domestic investments compared to large agricultural investments by Qatar abroad through government conventions. Moreover, modern agricultural techniques and equipment and drip irrigation are still not used in the majority of farms, which has reduced the efficiency of the plant production system and the overall productivity of the agricultural sector. This is due to a lack of data on cultivated areas and of modern agricultural censuses showing the number of production farms, the quantity of their production and the self-sufficiency and food security of vegetables, palms, fodder and fruits they achieve. In addition, low-value crops (feeds) are prevalent.

This first necessitates the conservation of agricultural land using advanced agricultural research since the limited agricultural land, harsh climatic conditions and high temperatures do not allow for crop rotation. This requires seeking other ways to increase productivity, enacting laws and legislation on agricultural production, and eliminating salinity resulting from a reduced groundwater level, which has caused soil degradation and low productivity.

Agricultural research will help use new techniques, introduce drip irrigation to replace traditional methods, change irrigation methods and stop cultivating crops that consume large amounts of water. The new agricultural policy also requires expanding marketing outlets, supporting farmers and fully applying procedures and directives for the use of TSE instead of groundwater despite the financial cost of delivering TSE systems to these farms and the difficulty to accept that from social and religious perspectives. Aquaculture should also be developed and introduced into the agricultural system, coupled with the reduction of water use to irrigate crops and of the use of chemical pesticides.

- **Target 1:** Develop an integrated agricultural service plan by 2022

Since fish contribute to food security, and in order to achieve 65% of the fishery self-sufficiency, it is essential to develop fisheries, promote the creation of advanced fish farms, diversify fish production, establish fishery industries, develop and equip fishing ports with essential services, establish a research center to improve fishery production, create a pilot plant for freshwater fish breeding, provide the sea with quantities of young groupers, review fishery legislation and enforce effective conservation laws. In this regard, there is a need to follow-up on the projects undertaken by the Department of Fisheries.

- **Target 2:** Increase the self-sufficiency ratio of fish stocks to 65% through advanced fish farms by 2022

In order to contribute to food security, the local livestock must be increased through diversifying species and veterinary services provided to farms (currently services are offered to two out of nine animal compounds) and creating quarantines and veterinary laboratories at border crossings.

- **Target 3:** Achieve self-sufficiency rate of 30% of animal production through a sustainable management of the animal production system by 2022

Intermediate outcome 4: Equip the Qatari companies, which manage and operate oil and gas fields, with higher technical and operational skills.

QP aims to assume a greater role in the management of Qatar's oil and gas fields, while facing their mounting technical challenges. To that end, QP recently established the North Oil Company (NOC) in partnership with French Total for the management and operation of the Al Shaheen Oil Field which the NOC received from Maersk and started operating it in mid-July 2017. In the same vein, a plan is being implemented to merge RasGas and QatarGas into a single entity, to be named Qatargas to create a unique global operator in terms of size, service and reliability, in addition to integrating the joint operations, which in turn will cut costs. The merger is scheduled to be completed by the end of 2017. QP also seeks to realize complementary coordination among the producing firms in support services (including maintenance, shipping and logistics), and improve the commercial terms of contracts to maximize State revenues. As part of its strategy to focus on its core business in the oil and gas industry, QP is handing over the management and operation of certain areas under its concession in the Meseieed Industrial City in 2017 to EZZ, and it intends to hand over the administration of municipal tasks in Meseieed to the MME. Moreover, QP plays a direct role in leading exploration and development operations.

This outcome is achieved through the following two targets:

- **Target 1:** Promote Qatar Petroleum participation in the oil and gas projects involving global oil companies at the end of their current deadline by 2022

This would help improve State revenues and benefit from integration with the rest of QP operations. This is what has already been done in the Khaleej and Al Shaheen oil fields, and what is planned for the future.

- **Target 2:** Recruit and develop technical workers and attract specialized manpower required to implement this outcome by 2022

This is done with a particular focus on the development of national cadres that work together with skilled expatriate workers in all areas of exploration, production, refining and distribution.

Intermediate outcome 5: Maximize the highest values from the extraction process of Qatar's oil and gas fields to ensure the continuation of revenue flows and to conserve the hydrocarbon wealth for future generations

QP seeks to maximize the value of hydrocarbon resources through projects for the improvement and commercialization of the concessions of QP and its subsidiaries, joint ventures and co-production fields.

QP also seeks complementary coordination among producing firms in support services, including maintenance, shipping and logistics, in addition to improving the commercial terms of contracts to maximize State revenues.

QP plays a direct role in leading exploration and development operations. In the area of production efficiency, the sector aims to minimize gas flaring.

This outcome will be achieved through the following two targets:

- **Target 1:** Increase investment in order to maximize hydrocarbon reserves in the Qatari fields and discover new fields by 2022
- **Target 2:** Upgrade all oil and gas operations to maximize operational efficiency and reduce costs by 2022

Intermediate outcome 6: Petrochemical and refining industry with greater value added that achieves the highest possible income and supports Qatar's strategic options

Developing the petrochemical and refining industry is strategically important to maximize the returns of raw materials in Qatar and strengthen intermediate industries. The primary hydrocarbon materials available from fields (crude oil, gas, etc.) has enabled the development of profitable and world-class refining and petrochemical industries in Qatar and these industries have ensured the provision of refined products to meet the local market needs.

This sixth intermediate outcome will be achieved through the following targets:

- **Target 1:** Use available non-allocated primary hydrocarbon materials in an efficient and profitable manner to expand the petrochemical industry, taking into account Qatar's strategic priorities by 2022
- **Target 2:** Enhance the efficiency of existing refining and petrochemicals companies by 2022
- **Target 3:** Meet the growing domestic demand for refined petroleum products and natural gas by 2022

5. Conclusion

Natural resources, especially oil and gas, contribute more than half of Qatar's GDP. Thus, the main outcome is: **'Optimal exploitation and sustainability of natural resources for the people of Qatar'**

In order to achieve this outcome, the Natural Resources Management Strategy focuses on conserving, sustaining and diversifying water resources, including desalinated water, groundwater, and recycled water, which could be achieved by reducing the desalination costs and all kinds of water loss, enforcing the Conservation Law, launching awareness campaigns and increasingly using TSE.

Moreover, NRM strategy also focuses on the conservation of sustainable and diversified energy resources through reducing the production cost of natural gas-powered energy and reducing loss in domestic household sector, which consumes 59% of electricity. Loss results from using old and inefficient household appliances. Therefore, the strategy of this sector is to reduce the per capita consumption of electricity by promoting integrated water and electricity management.

The NRM strategy also focuses on a sophisticated plant, animal and fishery production system that promotes self-sufficiency and food security through the use of modern technologies in agriculture based on valid data on cultivated acreage, number of farms and production volume so as to preserve land from degradation and low productivity using an integrated agricultural service plan.

This Strategy will make it possible to increase self-sufficiency of fishery to 65% and of livestock to 30% of Qatar's total need.

Moreover, the Strategy calls for an optimum utilization of hydrocarbon resources to ensure sustainable development through increased technical and operational capacity of companies and to achieve a higher value of extractive operations of oil and gas fields and of industry and refining.

6. Annex

Intermediate outcomes, targets, projects, and implementing agencies that contribute to achieve the main outcome “Optimal exploitation and sustainability of natural resources for the people of Qatar”

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
Intermediate Outcome 1: Sustainable and diversified water resources	1.1 Conserve and develop water resources by 2020 by reducing total (actual + administrative) losses of drinking water and reducing per capita water consumption by 15% through the national program “Tarsheed”	Finalize the Water Draft Law and its bylaws Replace all old meters with smart meters under smart grids, including the Leak Detection Project Improve the collection and invoicing of consumption readings Continue to use modern techniques to reduce water losses	Kahramaa	General Secretariat of the Council of Ministers - Legislation Department Ashghal MME
	1.2 Minimize groundwater depletion and develop the groundwater aquifer by 2020	Develop Qatar’s Water Policy and Strategy Consultancy services to study the feasibility of the injection of desalinated water A.B into the aquifer and implement the project if feasible	Kahramaa	Permanent Water Resources Committee Stakeholders Permanent Water Resources Committee Stakeholders

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
		Advisory and operational services for the rehabilitation of 5 potable well sites, a project to rehabilitate high-salinity wells and install mobile desalination units	Kahramaa	Permanent Water Resources Committee Stakeholders
Intermediate Outcome 2: Sustainable and diversified energy resources in the State of Qatar	2.1 Promote integrated water and electricity management by the end of 2020 and reduce per capita electricity consumption by 8% through the national program "Tarsheed"	Promulgate laws to encourage the use of energy efficient appliances	Kahramaa	MOEI
	2.2 Provide data on new and renewable energy by 2021	Issue a Green Building Code		
		Create a new and renewable energy database with an atlas of energy by 2022		
Intermediate Outcome 3: A sophisticated plant, animal and fish production system that promotes self-sufficiency and food security	3.1 Develop an integrated agricultural service plan by 2022	Draw up and implement an Integrated Agricultural Activity Management Plan	MME	MEC MOF

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
	3.2 Increase the self-sufficiency ratio of fish stocks to 65% through advanced fish farms by 2022	Develop and implement an Integrated Fishing and Fishery Sector Management Programme and develop the necessary legislation	MME	Mol Live Water Resource Committee MOTC QU
	3.3 Achieve self-sufficiency rate of 30% of animal production through a sustainable management of the animal production system by 2022	Develop and implement an Integrated Livestock Development Programme Establish pilot extension farms with an integrated development programme for breeding methods and animal nutrition and identify the most suitable species for breeding	MME	MEC
Intermediate Outcome 4: Equip the Qatari companies, which manage and operate oil and gas fields, with higher technical and operational skills.	4.1 Promote Qatar Petroleum participation in the oil and gas projects involving global oil companies at the end of their current deadline by 2022	Operational excellence, which aims to increase efficiency, risk management and cost control to achieve a high value added by 2020	QP	
	4.2 Recruit and develop technical workers and attract specialized manpower required to implement this outcome by 2022		QP	

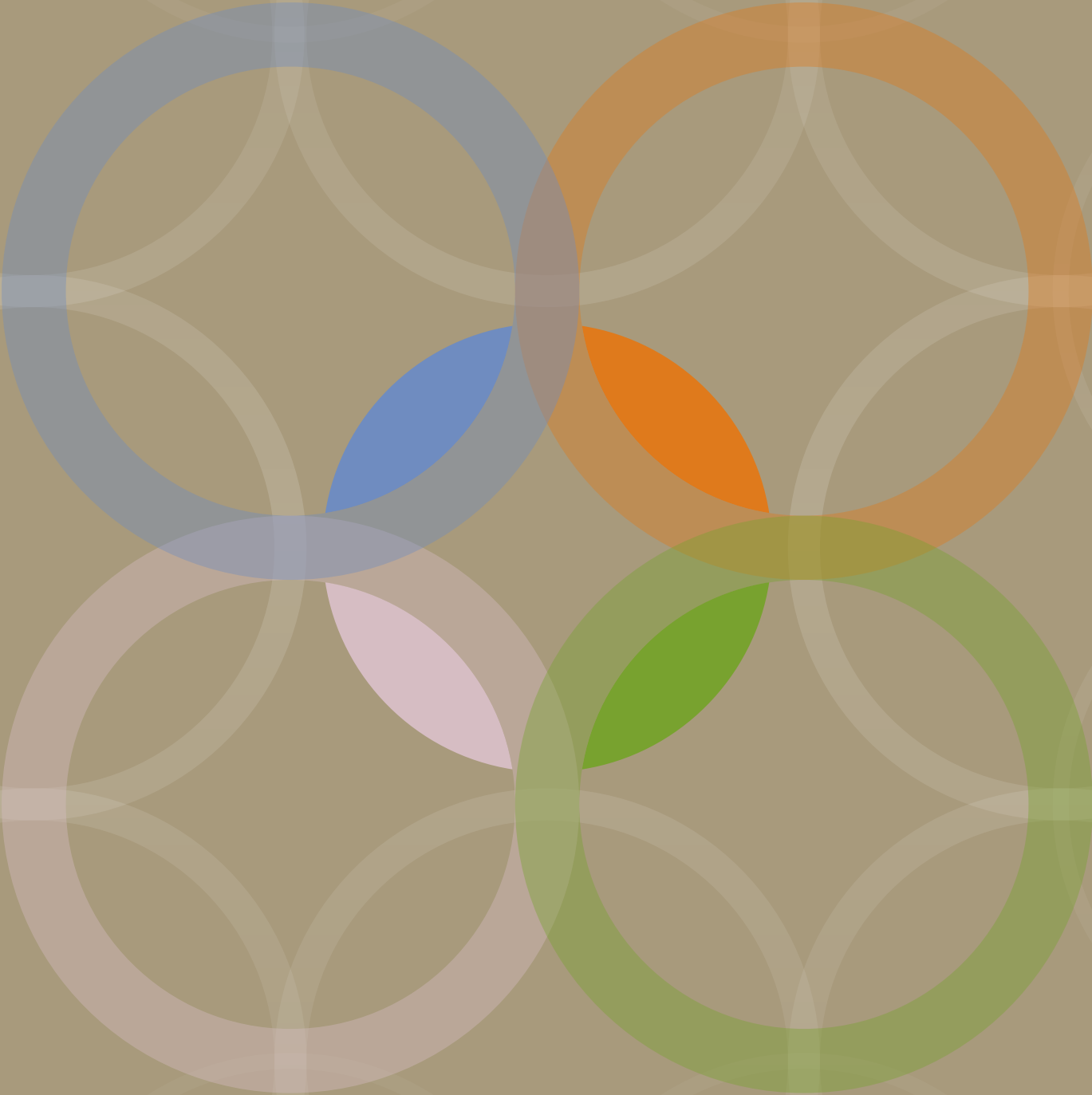
Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
<p>Intermediate Outcome 5: Maximize the highest values from the extraction process of Qatar’s oil and gas fields to ensure the continuation of revenue flows and to conserve the hydrocarbon wealth for future generations</p>	<p>5.1 Increase investment in order to maximize hydrocarbon reserves in the Qatari fields and discover new fields by 2022</p>	<p>Develop a new gas project within the southern sector of the North Dome Field, which can be allocated for export, at a production capacity of 4 billion cubic feet or 20% of the current production rate of the North Dome Field.</p>	<p>QP</p>	
		<p>Update the Dukhan Field Development Plan (using the latest information and in conformity with the oil and gas reservoir model), and use enhanced oil recovery (EOR) techniques and water alternating gas (WAG) injection for Arab C and Arab D reservoirs in the Jleha sector.</p>	<p>QP</p>	
	<p>5.2 Upgrade all oil and gas operations to maximize operational efficiency and reduce costs by 2022</p>	<p>Complete the re-development of the Bulhnen Field.</p>	<p>QP</p>	
		<p>Continue studying the re-development of the QP-operated maritime fields.</p>	<p>QP</p>	
		<p>A top offshore platform and a new base in the North Field Alpha (NFA).</p>	<p>QP</p>	
		<p>Reduce gas flaring by 80% in the Accompanying Gas Investment Project at the Al Shaheen Field.</p>	<p>QP</p>	
		<p>Recover evaporated gas from LNG cargo tankers at Ras Laffan Port, which was carried out by QatarGas on behalf of QP, RasGas and its shareholders.</p>	<p>QP</p>	

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Supporting agencies
<p>Intermediate Outcome 6: Petrochemical and refining industry with greater value added that achieves the highest possible income and supports Qatar's strategic options</p>	<p>6.1 Use available non-allocated primary hydrocarbon materials in an efficient and profitable manner to expand the petrochemical industry, taking into account Qatar's strategic priorities by 2022</p> <p>6.2 Enhance the efficiency of existing refining and petrochemicals companies by 2022</p> <p>6.3 Meet the growing domestic demand for refined petroleum products and natural gas by 2022</p>	<p>Operationalize the Laffan Refinery 2, a condensate refinery in the Ras Laffan Industrial City, at an operating capacity of 146,000 barrels per day</p>	<p>QP</p>	

Part IV: Promoting Human Development



Chapter I: Comprehensive and Integrated Healthcare System



1. Introduction

QNV 2030 is a national framework for achieving sustainable development to meet the needs of the current generation without compromising those of future generations. Healthy population is crucial to enabling sustainable human development, which is the foundation for any prosperous society. QNV 2030 is committed to developing healthy population through a comprehensive world class healthcare system with services accessible to the entire population. This integrated healthcare system provides preventive, curative, physical and mental healthcare taking into account the different needs of men, women and children, in addition to effective and affordable services in accordance with cost-sharing principles. Moreover, the system supports high-caliber research aimed at improving healthcare effectiveness and quality.

Based on QNV 2030 pillars, the Ministry of Public Health (MOPH) emphasizes in its document entitled “Future Vision of Care, Building a Healthy and Vibrant Society” the need to promote public health and healthy lifestyles, and provide a community-based primary care as a foundation of an integrated and successful healthcare system. The first National Health Strategy 2011-2016 (NHS-1) was developed to support the long term QNV 2030 goals and the national vision of health. NHS-1 had comprehensive programmes for institutional and regulatory reforms which built a solid foundation for the second National Health Strategy (NHS-2). The NHS-1 achieved key improvements which are: improved regulation and quality through the establishment of Qatar Council for Healthcare Practitioners (QCHP); ambulance response rate exceeded the identified targets; greater capacity and better access to health services through expanding services and establishing new hospitals and health centers; increased efficiency of resource allocation and use through adopting performance-based budgeting; completion of Healthcare Infrastructure Master Plan and Healthcare Workforce Plan; improved strategic direction by developing detailed frameworks, plans and policies for a number of critical areas, including e-health and data management, diabetes, public health, mental health and cancer.

Upon its adoption, the NDS-1 identified seven health sector goals that included 35 projects to achieve 88 targets (Supreme Council of Health, MDPS, NHS-1): Midterm Review Report, 15 June 2014, page 6), then, due to the need, the number of projects was increased to 42.

The seven sector outcomes were: A comprehensive world class health system; integrated healthcare system ; preventive healthcare; skilled national workforce; national health policy; effective and affordable services based on cost-sharing principle; and high-quality research. These sector outcomes included 39 projects. For more effective, integrated and optimized efforts, the project “additional public health programmes” was reorganized in 2012 to include 4 new projects: (i) “Implementation of the National Road Safety Strategy”; (ii) “Establishment of a Food Safety Authority”; (iii) “Emergency Preparedness”; and (iv) “Environmental Health”. The project “improving skill-mix” was incorporated into the “National Workforce Planning” project. At the same time, new projects were added to address emerging issues, such as “Laboratory Service Integration and Standardization” and “Diabetes Care Services Design”.

The Second National Healthcare Sector Strategy 2017-2022 (NHS-2) will leverage the successes builds on the achievements of the first National Health Strategy 2011-2016 (NHS-1) and the lessons learned. It looks forward to reach the unmet NHS-1 targets, and sets new priorities. The NHS-2 is based on three main pillars: The triple aim of better health, better care and better value along with a more integrated and effective health system.

MOPH has led the NHS-2 development through a rigorous participatory process with stakeholders from the health sector and other sectors. This process took into account the result-based situation analysis and regional and international benchmarking, in addition to a transitional programme on lessons learned from NHS-1.

The health system strives to “ensure the delivery of high quality services in a sustainable manner to future generations”.

2. Progress in healthcare sector goals and programmes (2011-2016)

Qatar's National Health Strategy 2011–2016 was an ambitious undertaking, and there was much progress across the sector, with many positive achievements moving Qatar forward towards reaching the QNV 2030 goals. Upon its conclusion in December 2016, NHS-1 had introduced fundamental reforms across the healthcare sector through seven goals and 38 projects, with over 200 distinct outputs accomplished successfully within the set time frame.

The success was the result of the collaborative efforts of numerous committees and working groups, as well as the hard work and commitment of many individuals.

The Healthcare Strategy 2011–2016 resulted in stronger governance, improved policy development, and the design and delivery of several complex projects. We now look forward to building on these robust foundations and sustaining the excellent work that has been done to date. Some of the major outcomes are highlighted below.

Strategic Direction

The National Health Strategy 2011-2016 laid essential foundations for the future by establishing detailed frameworks, plans and policies under each of its seven goals of the National Health Strategy 2011–2016, which are as follows:

Goal 1: A Comprehensive World-Class Healthcare System

A number of health strategies were developed to build the desired system, namely; National Primary Healthcare Strategy 2013-2018: Aimed to build a world-class primary healthcare service that is comprehensive, integrated and person-centered, working in partnership with individuals, families and communities to advance their health and well-being; National Continuing Care Strategy 2015: Outlined a series of practical steps to develop an effective and efficient continuing care system, highlighting the importance of treating patients at the right level of care and in the right setting; Qatar National Mental Health Strategy 2013-2018: Articulated the vision for an integrated mental health system, supported by the approved Mental Health Law, currently in effect; Organization of Hospital Services: Includes clinical criteria for four levels of complexity across hospital services; Qatar National Diabetes Strategy 2016-2022: Aimed to redesign the model of diabetes prevention and care, including health promotion, to ensure lifestyle advice, education and counseling are available to diabetic patients and those at risk of developing Type 2 diabetes; Emergency and Urgent Care Model: Developed the concept and model for providing emergency and urgent care services in health system, including setting standards for such services; Review of National Cancer Strategy 2011-2016, National Cancer Framework 2017-2022: Developed to identify objectives at the national level on health education, early detection, and high-quality cancer treatment and services; National Oral Health Strategy Road Map: Includes a national survey of oral health and recommendations on improving oral health in Qatar, including a scientific study on water fluoridation; and Community Pharmacies Strategy 2011-2016: Developed to expand access to pharmacies through an integrated pharmacy network.

Goal 2: An Integrated System of Healthcare

Implementation of Health Service Performance Agreements (HSPAs): Developed to monitor healthcare organizations outcomes related to quality; National guidelines on clinical practice and clinical care pathways working group was established: Developed 30 national clinical guidelines and associated clinical pathways; National E-Health & Health Data Management Strategy: Developed to identify standards, data sets, policies and requirements related to e-health; and National Laboratory services Integration and Standardization Strategy 2013-2018.

Goal 3: Preventive Healthcare

A number of programmes and projects developed to enhance the country's focus on proactive health promotion, disease

prevention and early detection of diseases, as well as strengthening national public health management. Some of these programmes include: Qatar Public Health Strategy 2017-2022; Qatar National Nutrition and Physical Activity Action Plan 2017-2022; National Screening Framework and Operating Model (draft); Tobacco Combating Action Plan; and Qatar National Health Emergency Management Plan.

Goal 4: A Skilled National Workforce

Qatar Health Workforce Plan 2014-2022: Contains seven strategic themes with short-, medium- and long-term actions, workforce capacity and capability planning, skill mix optimization, recruitment and retention.

Goal 5: A National Health Policy

Qatar Council for Health Practitioners (QCHP) was established, and the QCHP five-year strategic plan (2017-2022) was developed, focusing on sustainable growth, excellence and quality, partnership and participation, and ensuring a high-performing organization. Health facility licensing protocols and accreditation standards were developed and Qatar National Formulary was implemented.

Goal 6: Effective and affordable services, partnership in the bearing of healthcare costs

New hospitals and health centers have been opened; basic clinical services have expanded and transformed and Qatar Health Facilities Master Plan 2013-2033 was developed, including an action plan for the first five years.

Performance-based budgeting system was developed and is being applied on phases. Role of the private sector in the provision of healthcare remains a significant opportunity area and will be a key consideration in the future health system.

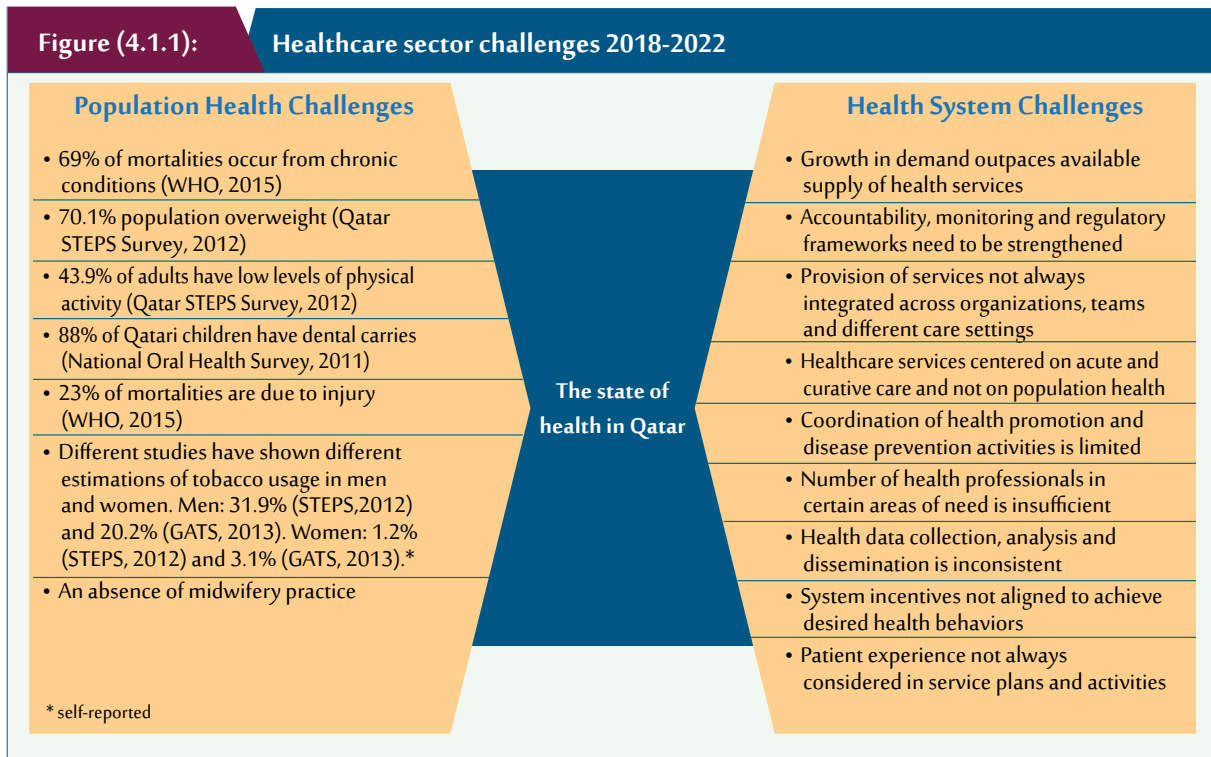
Goal 7: High-Quality Research

Qatar National Research Ethics Committee was established, a sustainable form for registration at the Institutional Review Board (IRB) was introduced, researches were ethically reviewed and Qatar National Genomic Medicine Policy was developed. We are proud of these successes and achievements, which have greatly benefited the Qatari health system. Over the length of the strategy, we will continue to progress in the implementation of these critical projects.

3. Healthcare sector challenges 2018-2022

Community health challenges

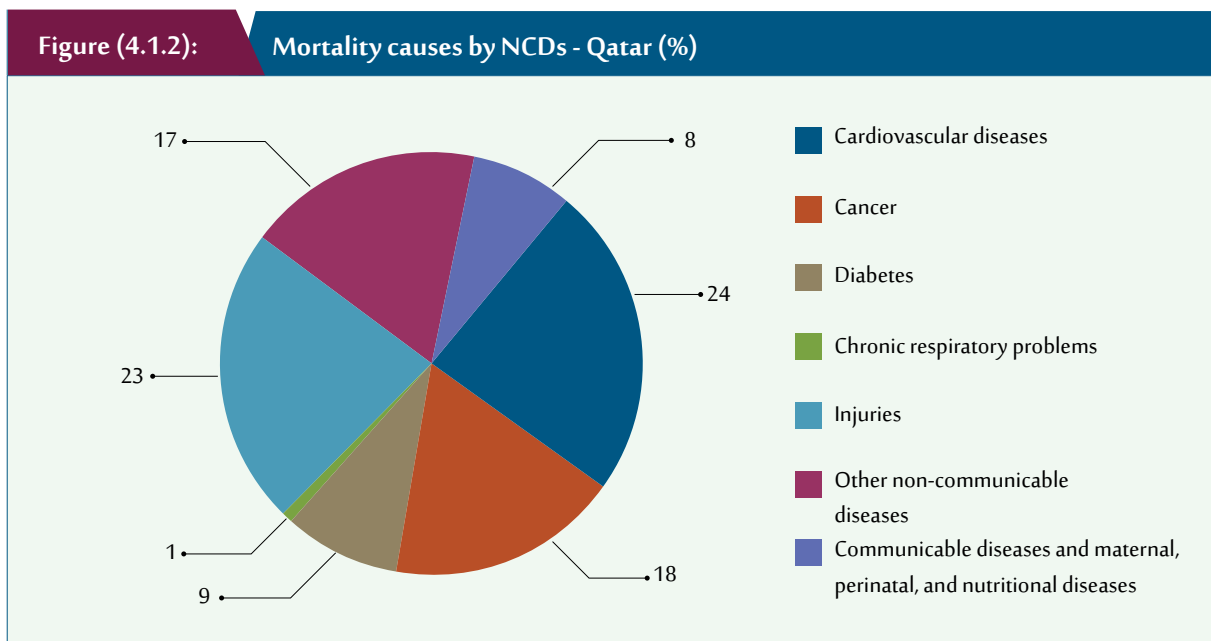
According to available statistics, there is a number of health challenges at the whole community level, namely: 69% of mortalities are related to chronic conditions; 70.1% of population are overweight; 43.9% of adults have low physical activity; 88% of Qatari children have dental caries; and 23% of mortalities are related to traffic accidents. Different studies have shown different estimations of tobacco usage by men and women. Men: According to STEPS study in 2012, 31.9% of smokers were men and 1.2% were women, while the GATS study in 2013 showed that 20.2% of smokers were men and 3.1% were women. The last challenge is the absence of midwifery position. Figure 4.1.1 below summarizes Qatar healthcare sector challenges at both health system level and public health level.



Source: MOPH

Population health challenges

High incidence of non-communicable chronic diseases continues to be one of the major challenges to Qatar population health. Figure 4.1.2 illustrates the most common causes of death and premature death, which are generally related to unhealthy lifestyles. The leading cause of death is cardiovascular disease (24% of all deaths), followed by cancers (18%) and other chronic NCDs (17%). Chronic respiratory diseases contributes to 9% of all deaths. See figure 4.1.2 below.



Source: WHO, Non-Communicable Disease, country profiles 2014-Qatar

Health system challenges

Demand rates have increased beyond the current capacities of the system. Accountability, monitoring and regulatory frameworks need to be strengthened. Provision of health services are not always integrated across health organizations. Healthcare services are centered on acute curative care and not on community's public health. Coordination of health promotion and disease prevention activities is very limited and the number of health sector workers in some specialties is insufficient. Moreover, Health data collection, analysis and dissemination are randomized and the incentive system in place does not amount to changing bad health habits. Finally, patient experience is not always considered when planning for health services.

4. Main and intermediate outcomes and identified targets of healthcare sector (2018-2022)

Main Outcome

“Improved health for Qatar’s population, meeting the needs of existing and future generations through an integrated health system that aims to achieve better health, better care and better value for all.”

National Health Strategy 2017-2022 provides a practical guide to development involving extensive changes to 12 intermediate outcomes, focusing on 7 priority population groups and 5 health sector priorities. While being achieved, these outcomes are supported by a comprehensive and integrated set of specific programmes with targets and indicators for progress monitoring and evaluation. Seven priority population groups will be the focus of the next business planning cycle. These are: Healthy children and adolescents; healthy women leading to healthy pregnancy and delivery; healthy and safe employees; mental health and well-being; improved health for people with multiple chronic diseases; improved health and wellbeing for people with special needs; and healthy ageing.

These seven priority population groups have been selected based on their importance to society as a whole, demographic data, and burden of disease. The strategy also identifies five additional areas of focus that go beyond the above mentioned population groups and affect the entire Qatar’s population. These are: Enhanced health protection; enhanced health promotion and disease prevention; incorporating health in all policies; integrated model of high-quality care and service delivery; and effective system of performance, organization and services to ensure better health, better care and better value.

At the heart of realizing our vision is the implementation of the population health approach. This approach aims to achieve health improvement through addressing the health needs of population groups, recognizing that determinants such as age, gender, geography, employment status and other socio-economic factors have a large impact on individual health needs.

We have identified seven priority population groups and 5 priority areas for system-wide focus that will guide the health sector’s activities and projects for the next years. These priorities reflect the specific health needs of the Qatari society as shown by existing figures and as agreed upon through rigorous consultations with government and health sector stakeholders. The priority setting process also takes into account internationally agreed global health priorities and best practices.

The seven priority population groups have been selected on the basis of the existing population and health needs of the Qatari society. They represent the life course of an individual and reflect major events and experiences that may occur in the journey of life. When selecting these groups, their significance to Qatari society, their vulnerability and their demand for services were all taken into consideration. .

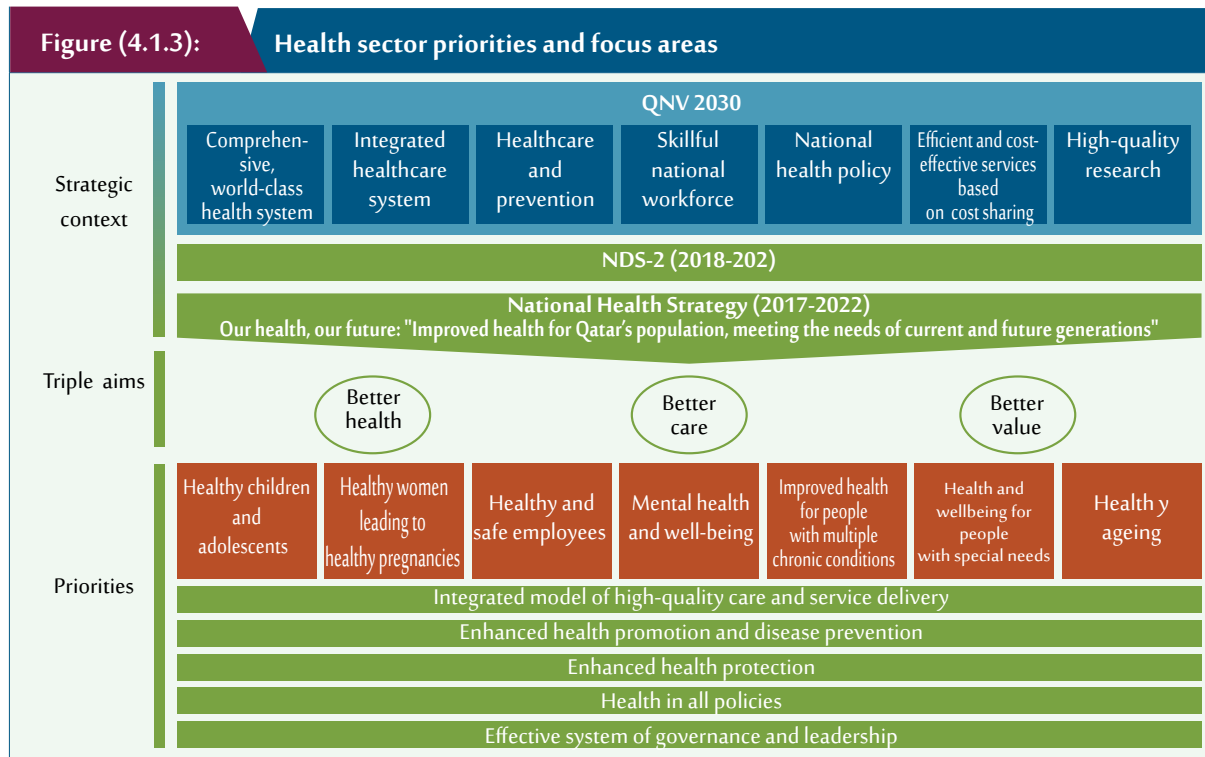
The priority population groups:

1. Healthy children and adolescents;
2. Healthy women leading to healthy pregnancies;
3. Healthy and safe employees;
4. Mental health and well-being;
5. Improved health for people with multiple chronic conditions;
6. Health and wellbeing for people with special needs;
7. Healthy ageing.

The system-wide priorities reflect cross-cutting themes that will improve our health system as a whole. The system must be effectively governed through strong leadership and policy. The system will focus on promotion of health, disease and ill-health prevention, and protection from public health hazards, utilizing a Health In All Policies approach; and ensuring the delivery of high quality and safe health services when needed through an integrated model that focuses on continuity and coordination across all levels of care.

The system-wide priorities:

1. Integrated Model of Care for the provision of high quality services
2. Enhanced health promotion and disease prevention
3. Enhanced health protection
4. Incorporating health in all policies
5. Effective system of governance and leadership



Source: MOPH, National Health Accounts 2016: OECD / Health Statistics 2016

I. Seven priority population groups

Intermediate Outcome 1: Healthy children and adolescents

The strategy will aim to ensure a healthy life for people aged 0-18 years, including promotion of healthy environments, where they live, grow, learn and play; encouraging healthy lifestyle choices and providing high-quality medical care when needed. In line with both national and international goals, and as stated in the WHO report, the development of healthy children is a critical pillar for the future of Qatari Society, since children represent a significant part of society. According to a survey conducted by MOPH, obesity and overweight are the main challenges to child health: in primary schools (6.6% are obese and 9.6% are overweight); in middle schools (7.3% are obese and 12.5% are overweight) and in secondary schools (8.7% are obese and 15.3% are overweight). Children also suffer from reduced physical activity, tobacco consumption among adolescents and other health problems such as dental decay, vitamin D deficiency and anemia. Healthcare delivered to children faces some challenges such as lack of quality data and lack of awareness within the family and the community.

With the aim to improve healthcare for children, the strategy will draw on improving data to enhance management, follow-up and decision-making. This will enable MOPH to raise the Qatari society awareness of child health, especially among families and parents, through promoting participation in various activities, launching awareness campaigns and helping to increase physical activity and reduce weight. The strategy will improve the curative care, and develop the preventive care as well. The curative part will seek to improve oral health for all children, develop high quality pediatric services and provide them especially in schools and for those with special needs. On the other part, preventive care will work to increase breastfeeding rates at birth; enhance healthy nutrition and physical activity for all age groups and reduce child injuries and abuse. Given the significance of Qatari adolescents, focus has been placed on reducing high-risk behaviors among them, combating smoking by reducing tobacco consumption, in addition to understanding the future challenges to this population group through promotion of relevant researches.

- **Target 1:** Decrease the prevalence of dental carries in children by 25% among children under 5 years
- **Target 2:** Increase by 15% of the level of exclusive breastfeeding at 6 months of age
- **Target 3:** 25% increase in the proportion of adolescents who meet recommended levels of physical activity.

Intermediate Outcome 2: Healthy women leading to healthy pregnancies

Women should be enabled to understand the importance of healthy living which leads to healthy pregnancies, and they should have access to high-quality reproductive healthcare throughout pregnancy and postpartum. The mother is the first pillar and the starting point for building a balanced society. Without thinking about her health and safety during pregnancy, it will not be possible to produce healthy children. Therefore, one of the Millennium Development Goals, according to WHO, is to reduce maternal deaths to 70 per 100,000 births.

Qatar has a middle rank regarding this intermediate outcome (Healthy women leading to healthy pregnancies) in terms of health expenditure. This rank goes even lower when compared to high income countries which makes addressing this priority very important to improve the current status. Some of the most important causes to be addressed are malnutrition and obesity (43.2 % among Qatari females) which in turn lead to chronic diseases such as diabetes (39 %) and low levels of physical activity (more than 80% according to MOPH survey), as well as symptoms of anemia in pregnancy which remain at high levels contrary to expectations. Pregnant women in Qatar also suffer from lack of follow-up care, both prenatal and postnatal; 60% of women do not receive postnatal care, according to MOPH survey.

NHS will work to increase knowledge about the real causes that challenge the improvement of antenatal and postnatal care, through improving data, developing national indicators and increasing health awareness of both mothers and care centers. NHS will also ensure enhancing the available knowledge base through adopting unified protocols and guidelines, while monitoring their application by various health facilities. NHS aims to ensure high-quality perinatal care, leading to decreased maternal deaths, through diagnosis and treatment of the most common diseases and monitoring the compliance with the guidelines. The principle of integration between facilities will also be applied, with setting the care level and service scope for each facility. On the prevention side, those who report confidential matters regarding abuse of pregnant women and young girls will be protected. High quality IVF (artificial insemination) services will be provided and expanded, as well as promoting and developing research on women and reproductive health and ovulation induction.

- **Target 4:** 10% improvement in score of the composite index⁵³ points used to assess women's health and proper pregnancy (including assessment of prenatal, perinatal, and post-natal care)

Intermediate Outcome 3: Healthy and safe employees

Focus will be placed on physical and mental health of workers to improve population health, increase efficiency and economic productivity and reduce the burden on healthcare services. All studies also confirm that occupational safety and health contribute effectively to improving productivity and social development, especially if social and individual factors that enable disease prevention and treatment cost reduction are integrated. This finding is particularly important for the Qatari society, since 86% of existing workforce is employed, thus enabling a high coverage rate for the Qatari society programme. The availability of data on workers' state of health, number of work injuries and occupational safety programmes is one of the top priorities. There is no dedicated system for tracking indicators and data collection. Currently, Hamad Hospital is the only entity

53 This indicator measures a number of variables related to maternal and infant health.

that counts occupational injuries (584 cases in 2016). Still, this effort is insufficient to provide a healthy environment at work.

To achieve good results, MOPH will improve basic data through establishing an occupational health data management and information system, as well as increasing the number of occupational health and safety (OHS) professionals. Based on the analysis of indicators, NHS will aim to raise health awareness among employers and workers by targeting them according to the serious risks associated with their work. Assessment will also be an important pillar for the development of occupational safety through establishing a continuous and regular occupational health assessment system (every two years) and developing a unified system to assess occupational hazards in all professions and situations on a case-by-case basis. This effort will culminate in the development of occupational safety promotion programmes under an integrated national policy based on reviewing all labor laws at both corporate and state levels. Moreover, research on occupational health and safety will be promoted.

- **Target 5:** 80% of government and semi-government employees will have access to an occupational health-based workplace wellness programmes.

Intermediate Outcome 4: Mental health and well-being

Future economic and social challenges can't be addressed without relying on a mentally healthy society members to be able to participate in society and work productively. Since the basic data on mental health and well-being are not available, NHS will improve epidemiological data in this area; improve the quality of integrated mental health services through standardizing the relevant clinical guidelines; develop a mental health law which provides for the training of professionals; and foster research on and raise public awareness of mental health.

- **Target 6:** Improve access to mental health services, while allocating 20% of these services to primary and community care sector.

Intermediate Outcome 5: Improved health for people with multiple chronic conditions

Improve coordination of care and patient participation and manage health conditions of this high-risk and high-cost population group in order to improve their health outcomes. Worldwide, the likelihood of developing a chronic disease has increased, given the changes in modern lifestyle such as smoking and physical inactivity. Developing multiple chronic diseases may cause premature death, noting that this is not primarily related to age as it is related to surrounding factors, especially the working environment. In Qatar, the incidence of multiple chronic diseases is one of the leading causes of death and has accounted for 69% of deaths in 2014.

In order to improve the overall health of the population, NHS will work to develop a data system for various chronic diseases and risk assessment, through developing research in this area. Clinical guidelines, particularly for critical chronic conditions, will be adopted and the quality will be developed by establishing a single access point for patients within a network of services and identifying the main team for managing chronic diseases in primary care centers. NHS also aims to reduce the costs, by limiting wrong admissions or re-admission for chronic conditions, and analyzing and evaluating the factors that lead to significant costs. Moreover, NHS will improve quality of service delivery by promoting research.

- **Target 7:** 25% decrease in the 30-day re-admission rate for chronic conditions.

Intermediate Outcome 6: Improved health for people with disabilities and special needs

Providing appropriate health services, special programmes and social services necessary for high quality of life, while focusing

not only on the needs of individuals but also supporting their families and caregivers. Special needs and disabilities may affect people at any stage of their lives, even from birth. Some children may be born with different physical, mental or sensory disabilities such as blindness and deafness, as well as learning and development difficulties. The treatment may require life-long services that vary by age and ongoing assessment-based interventions, including community integration, employment, housing and day care.

■ **Target 8:** every healthcare facility will have a system in place to meet the needs of persons with special needs.

Intermediate Outcome 7: Healthy ageing

Support disease-free ageing through enhancing health awareness, self-care capabilities and coordination of care, which can reduce disease and disability among populations above 60 years of age. The number of elderly people is increasing thanks to the increased life expectancy. Elderly people are more likely to have higher rates of chronic conditions. Their limited mobility, as well as mental health issues, will increase their social needs. They are at high risk for using multiple medications, visiting multiple providers and receiving conflicting advices. It is therefore critical to focus on this population group to increase their health knowledge, enhance their ability to take care of themselves, and provide coordinated care with the aim of reducing morbidity and disability among them. In addition, identifying their health risks and early detection of their illnesses will facilitate the timely intervention, prevent complications and support healthy ageing.

Other important factors include increasing the vaccination rates against pneumonia, influenza and diphtheria for people over 60 years, by 10% from current levels. The comprehensive geriatric assessment (cognitive and psychosocial) for all new elderly patients was 25 %. This intervention will enhance health outcomes and reduce healthcare costs. It is important to support the WHO definition of healthy aging as “the process of developing and maintaining the functional ability that enables well-being in older age” (WHO, 2016). Enhancing health literacy and developing healthcare systems in the long run will ensure delivery of integrated high-quality services to support healthy ageing, as well as ensuring that health workforce has the appropriate skill-mix to meet the needs of elderly population.

■ **Target 9:** One-year increase in healthy life years (HLY) for the over 65-year-old population.

II. System-wide focus areas

Intermediate Outcome 8: Integrated system of high-quality healthcare service delivery

The strategy has identified initiatives that will deliver an integrated model of healthcare which will be centered on delivering high-quality healthcare services in a timely manner and in the right place. It will be implemented through integrating preventive and curative care services, strengthening of primary and community care and coordination of services provided by different teams across the health sector, as well as involving and empowering patients. The model will also care for individual, family and community needs . Patients will be empowered to take greater responsibility for their health, while supporting self-health and self-care services. Care services will be accessible in a timely manner and systems will be integrated to ensure a well-established approach that delivers services to all populations.

Health promotion and disease prevention will move forward. Primary healthcare services will be delivered to individuals and families on a regular basis, so that citizens will realize that primary healthcare is the starting point for non-emergency situations. In these centers, people will receive care from multi-disciplinary medical teams (family-medicine, nutrition and health education). This will help them avoid the risk of chronic diseases later.

Integrated development of new systems is essential to enable patients, reduce waiting times for patients in secondary

healthcare, reduce emergency admissions for in appropriate cases, and allocate adequate time for primary healthcare.

- **Target 10:** reduction of overall amenable cause-specific mortality by 5%.
- **Target 11:** reduction of unnecessary hospital admissions for cases that can be treated in primary healthcare by 15%.
- **Target 12:** 85% of attendances to emergency departments screened, treated and discharged within 4 hours.
- **Target 13:** year on year 5% reduction of HCAs, in accordance with international best practice.

Intermediate Outcome 9: Enhanced health promotion and disease prevention

Provide health services and implement population programmes and interventions focusing on health promotion, early detection and disease prevention to avoid preventable deaths and diseases while promoting healthy behaviors and lifestyles.

- **Target 14:** decrease by 5% in obesity rate in children, adolescents and adults.
- **Target 15:** reduction in smoking prevalence by 30%.
- **Target 16:** reduction in premature mortality from cardiovascular diseases, cancer, diabetes and chronic respiratory diseases by 15%.

Intermediate Outcome 10: Enhanced health protection

Protecting the population from public health hazards associated with diseases, epidemics, infection, environment, chemicals, radiation, food, water, national emergencies and disasters. The health system is responsible for securing a safe environment for people to live in, protecting them from risks that threaten their health, and protecting their health information and data. Health protection is critical to Qatar, as it prepares for the 2022 FIFA World Cup, a large event that will have a mass gathering of people. Investing and planning in health protection will also positively affect the entire population's health outcomes and help control and mitigate any negative consequences when incidents occur and reduce the cost of treatment. Moreover, this will help protecting people who attend such global sport events from potential risks. Health protection also includes monitoring the safety and quality of food, water, air and the general environment, in addition to preventing infection and managing outbreaks and other incidents that may threaten the public health.

MOPH will supervise the development of strong and accurate monitoring and data management systems and strengthen early-warning system, i.e within 24 hours, in order to manage risks proactively and coordinate the response in the following areas: Control of infectious diseases, including emerging, re-emerging and healthcare associated infections, reduction of antimicrobial resistance by the end of 2020, reduction of inappropriate use of antibiotics at all levels of healthcare, both private and public, and establishment of food safety authority.

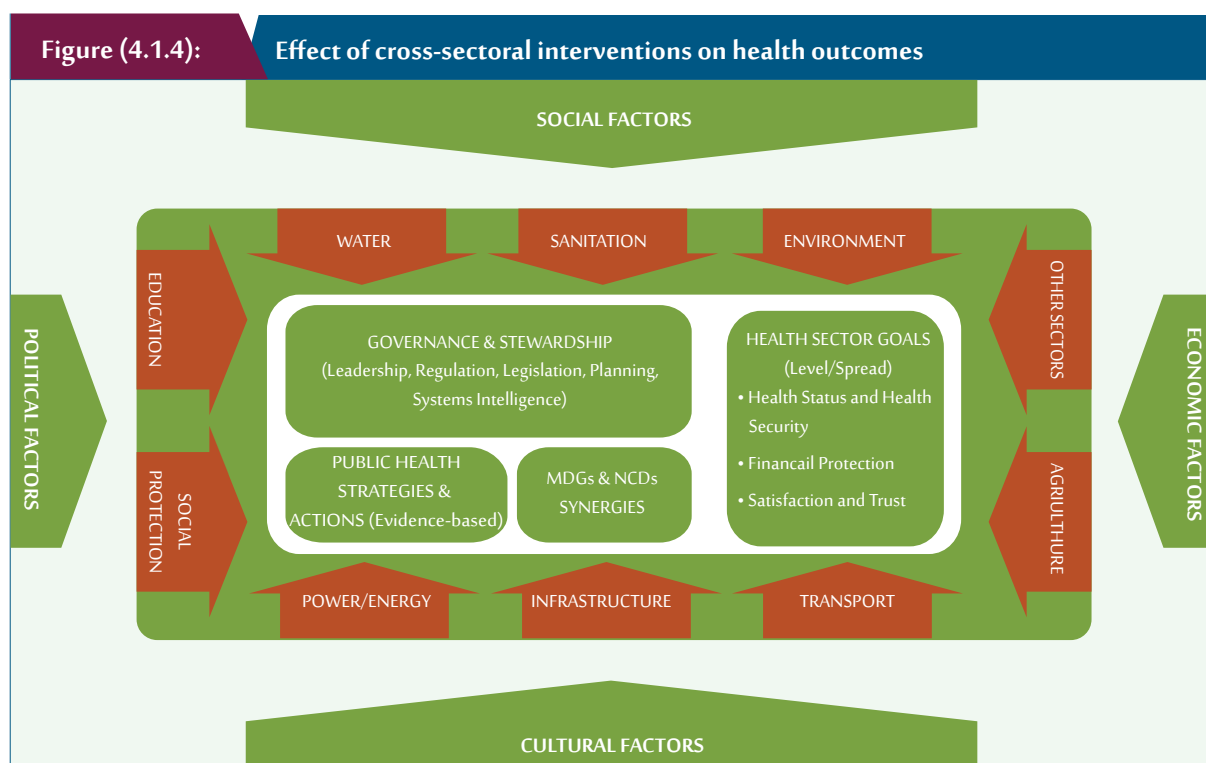
- **Target 17:** Real-time systems in effect to ensure compliance with international health regulations for surveillance and response (in preparation for Qatar 2022 World Cup).

Intermediate Outcome 11: Health in all policies (HiAP)

Ensuring the adoption of a cross-sectoral policy approach that regularly takes into account the impact and implications of decisions on health and health systems . The main focus of HiAP is to identify general policy measures that provide a 'win-

win’ or ‘co-benefits’ situation that help to achieve not only improved health outcomes, but also the desired outcomes of other sectors, such as education, social care and protection, environment, agriculture and transport. As such, HiAP suggests an approach to address complex or intractable policy problems that may require continuous efforts to be solved. The HiAP approach can be applied to issues ranging from improving healthy diets, decreasing tobacco use to limiting motor vehicle accidents. Many areas are likely to require HiAP approach to achieve desired outcomes, namely: Health and safe environment, including home, schools, public places and work environments; healthy cities in Qatar; injury prevention; healthy nutrition; mobility access; and provide physical and mental health and social services to people with special needs including integration into society.

There is a need to move forward critical regulatory and legal reforms that are now proceeding, but slowly. In addition, a number of health laws and regulations will need to be reviewed, and the existing laws need to be rigorously enforced. Healthcare governance needs more clarity and stability. There is also a need to strengthen health leadership and enhance policies, planning and regulation in order to ensure better informed strategic decision-making. Furthermore, strong coordination across the health sector as well as with other sectors is critical to integration of services and avoid fragmented and redundant implementation. Since health outcomes are strongly influenced by socio-economic and environmental factors outside the health sector, cross-sectoral integration is key to achieving national health targets (figure 4.1.5). Another main target is more clear and transparent communications with different stakeholders including the public.



Source: Health Sector Strategy (NHS 2017-2022) for NDS-2

Health consequences of all laws, regulations and policies will be made clear and understandable for all. To ensure that, policies should be developed requiring all government entities to apply a health impact assessment (HIA) in all new national-level laws, programmes, regulations and initiatives and acquire a certificate of compliance. Audit capacity should be built to ensure that each member entity adhere to the guidelines, as well as developing the Ministry of Public Health’s technical capacity to perform its tasks, and addressing obesity, including taxation of sugar-sweetened beverages, and removing all forms of subsidies for unhealthy food.

- **Target 18:** By the end of 2018, Qatar will develop and begin the implementation of “Health in All Policies” strategy and plan of action, with the goal of embracing the Healthy Cities approach in preparation for Qatar 2022 World Cup.

Intermediate Outcome 12: Effective system of governance and leadership

A strong and effective health system is fundamental to meet individuals health needs and achieve better health, better care and better value for Qatar’s population and communities. The system should insure universal health coverage, including financial risk protection, access to quality healthcare services and to affordable essential medicines and vaccines for all. To implement the health sector vision and strategies, appropriately sized and skilled health workforce must be developed and retained.

Our health system should insure realizing our vision of better health, better care and better value for our people. It should also work effectively to ensure that these three components of the vision are being addressed as a whole, and that the improved health outcomes are felt by both community and individuals. It is also important to integrate the components of health system efficiently and effectively in terms of cost. This includes regulations to ensure quality of services and patient safety; use of accurate data, research and evidence to inform planning and policy development; ensure that the health workforce is motivated and supported; Optimize the use of resources and finance; and monitor outputs at both individual and society levels. Significant components of an effective health system have been added to the Sustainable Development Goals, which we all should achieve. These components are: (1) Substantially increase health financing and the recruitment, development, training and retention of the health sector workforce; and (2) Achieve universal health coverage, including financial risk protection, access to quality essential health-care services and access to safe, effective, quality and affordable essential medicines and vaccines for all. The WHO identifies six components/building blocks to an effective health system, all of which are critical and must also work together in harmony

The current public health laws and regulations need to be revised and updated by the relevant authorities to keep up with the new health system and to achieve the integrated model of healthcare

The “Social Health Insurance Project ” will play an important role in reaching main and intermediate outcomes and targets identified in the National Health Strategy with an aim to improve health of Qatar’s population and meet the needs of current and future generations through an integrated health system delivering better health, better care and better value for all. This project will contribute to alleviating the challenges facing the economic diversification and private sector development. It will also play a role in easing some of the burden on public healthcare services by providing options for patients to benefit from private healthcare services.

The health system aims to provide better care at a lower cost through improved efficiency and effectiveness; developed and implemented clinical pathways for diseases that have a significant impact on the health system and cost; streamlined and enforced processes to support and hold accountable health providers and other stakeholders; enhanced licensing efficiency of all clinical healthcare providers; and continuous review and update of licensing regulations based on the new model of care and required new health professions, and service delivery on the basis of license and scope of service.

Furthermore, database and information systems will be also established to allow timely access to relevant data for planning, research and quality improvement purposes. In order to optimize decision-making process, analytical capability will be improved to produce system-wide evidence and information. A secure platform will be established to improve access to data for planning, research and quality improvement purposes.

In addition, leadership, governance and guidance within the health system will be strengthened. A mechanism will be

established to ensure that individuals in leadership positions are effective, along with an appropriate mechanism for monitoring leadership capacities. Roles and responsibilities will be clearly defined and assigned across all national leadership levels. We will recruit and retain highly-skilled and experienced workforce by attracting best local and international healthcare professionals, through offering attractive salary packages.

■ **Target 19:** Strengthening health system governance through:

- Annual increase of 0.2% in the proportion of government health sector budget relative to GDP, reflecting increasing investment in system performance, preventive services and primary healthcare, thereby achieving an Integrated Model of Healthcare.
- Establishing a dynamic mechanism within MOPH to routinely measure available vs. required capacity within the health sector to plan and achieve stated targets.
- Increasing private sector share of healthcare market to reach 25%.
- Enhancing universal health coverage in line with international practice.

5. Conclusion

The implementation of different MOPH programmes and projects requires close collaboration between MOPH and its implementing partners and owners of these programmes and projects. There is no doubt that the commitment to implementation process requires factors that should interact with each other to achieve the various commitments and activities addressed by the health sector strategy. Among the key success factors of any programme or project is the real understanding of the nature of the programme and the required resources and information, as well as identifying implementation mechanisms. Success also requires other factors ranging from the readiness of the implementing entities at all levels to the monitoring and evaluation process during the project life cycle, which aims to enhance advantages and identify the key challenges and how to confront and overcome them.

To ensure successful and sustained implementation of programmes and projects, it is very important to build upon the lessons learned from the implementation of the first NHS, particularly with regard to challenges which are also expected to emerge with the implementation of the second NHS and how they were addressed. Coordination and collaboration with all actors during the implementation process are essential to achieve the health sector strategic objectives. We are looking forward to achieve our ambitious plan of an advanced healthcare system that responds to future challenges and helps the community achieve improved public health in line with QNV 2030.

6. Annex:

Intermediate outcomes, targets, projects, and implementing agencies that contribute to achieve the main outcome “Improved health for Qatar’s population, meeting the needs of existing and future generations through an integrated health system that aims to achieve better health, better care and better value for all”.

A. Projects within the priority framework at the level of priority population groups:

Code	Intermediate outcomes *	Project title	Implementing agencies	Supporting agencies	Project-related target(s)
HCA1		Improve epidemiologic data collection and monitor health metrics	MOPH	MDPS MEHE All healthcare providers QU Research Entities	Targets 1, 2 and 3
HCA2	Intermediate outcome 1: Healthy children and adolescents	Implement national screening and surveillance programmes for age group 0-18 years, covering high-risk groups, lifestyle, high-risk behaviors, and safety	MOPH	All healthcare providers	Targets 1, 3 and 14
HCA3		Increase health awareness of parents and families, especially in high need areas such as healthy lifestyle and child safety	MOPH	All healthcare providers MEHE Medical universities QU	Targets 1, 3, 14 and 15
HCA4		Develop programmes to increase rate of exclusive breastfeeding	MOPH	All healthcare providers	Target 2

Code	Intermediate outcomes *	Project title	Implementing agencies	Supporting agencies	Project-related target(s)
HCA5		Promote nutritional health, and decrease incidence of morbidity due to vitamin deficiencies	MOPH	MEHE MDPS All healthcare providers Research entities Medical universities QU	Target 14
HCA6		Enhance and expand preventive and curative programmes to improve oral health for all children	MOPH PHCC	All healthcare providers Kahramaa Public and Private Schools Universities MEHE	Target 1
HCA7		Improve mental and behavioral health in children and adolescents	MOPH	MEHE PHCC Sidra for medicine and research	Target 6
HCA8		Launch a comprehensive, integrated national School Health Programme led by MOPH, which sets health curriculum	MOPH	PHCC Sidra for medicine and research Public and private schools MEHE	Targets 1, 3, 4 and 16

Code	Intermediate outcomes *	Project title	Implementing agencies	Supporting agencies	Project-related target(s)
HCA9		Improve physical activity and decrease sedentary lifestyle behavior and obesity	MOPH	All healthcare providers MEHE Public and Private schools MOCS Research entities MOTC	Targets 3 and 14
HCA10		Decrease tobacco use among teenagers	MOPH	All healthcare providers MEHE Public and Private schools MOCS Research entities MOTC	Target 15
HCA11		Develop National and integrated Model of care and service provision for pediatrics, focusing on continuity of care	Sidra for medicine and research	MOPH All healthcare providers	Target 19
HCA12		Expand child development services and services for children with special needs	HMC MOPH	All healthcare providers MEHE	Target 8
HCA13		Enhance monitoring system for vaccination coverage to ensure accurate and timely data	MOPH	All healthcare providers	Target 17

Code	Intermediate outcomes *	Project title	Implementing agencies	Supporting agencies	Project-related target(s)
HW1	<p>Intermediate outcome 2: Healthy women leading to healthy pregnancies.</p>	Improve epidemiologic data collection and monitoring of health metrics including maternal mortality and major incidents	MOPH	All healthcare providers MEHE Weill Cornell medical college	Target 4
HW2		Increase pre-pregnancy health awareness and improved healthy lifestyle for women of reproductive age	MOPH	HMC Sidra for medicine and research PHCC All healthcare providers MEHE MDPS	Target 4
HW3		Implement and monitor compliance with national guidelines for pre-natal and post-natal care	MOPH HMC Sidra for medicine and research PHCC	All healthcare providers	Target 4
HW4		Enhance effective peri-natal care and improve outcomes	Sidra for medicine and research HMC	All healthcare providers MOPH	Target 4
HW5		Develop a surveillance system for monitoring of maternal mortality and major incidents	MOPH	All healthcare providers	Targets 4 and 10

Code	Intermediate outcomes *	Project title	Implementing agencies	Supporting agencies	Project-related target(s)
HW6		Design and implement a model of maternity care services, indicating levels of care and defined scope of service for each entity, with clear care pathways and referral guideline lines between entities (including private sector)	Sidra for medicine and research HMC	PHCC All healthcare providers Health insurance companies	Target 4
HW7		Design and implement an effective governance mechanism for IVF and ovulation induction	MOPH	All healthcare providers Health insurance companies	Target 4
HW8		Implement a midwifery care service	PHCC	All healthcare providers MEHE MOPH	Targets 4 and 9
HW9		Redefine legislation around maternity leave, sick leave and working hours during pregnancy	MOPH	ADLSA MEC QFC	Target 4
HW10		Develop policies for preventing abuse of women	MOPH	MOI All healthcare providers QF NGOs	Target 4

Code	Intermediate outcomes *	Project title	Implementing agencies	Supporting agencies	Project-related target(s)
HE1	Intermediate outcome 3: Healthy and safe employees	Establish an Occupational Health and Injury data management and information system, for the monitoring and evaluation of the health status of all employees, and the performance of OH services	MOPH	All healthcare providers ADLSA Public and private sector employees MEC QP	Target 5
HE2		Develop and implement national guidelines on Occupational Health Assessments	MOPH	All healthcare providers ADLSA QP	Target 5
HE3		Develop and implement a National Policy for occupational health, workforce safety and protection of staff in the workplace for all sectors	MOPH	All healthcare providers ADLSA MEC QFC QP	Target 5
HE4		Develop and implement a National Policy for Workforce Safety and Protection of Staff, specific to healthcare workplace	MOPH	All healthcare providers ADLSA	Target 19
HE5		Establish effective workplace wellness programmes that promote physical and mental health, and reduce occupational risks and workplace hazards	MOPH	ADLSA Private and public sector companies/entities	Target 5

Code	Intermediate outcomes *	Project title	Implementing agencies	Supporting agencies	Project-related target(s)
HE6		Monitor compliance of employers with national policies and workplace wellness programmes	MOPH	ADLSA Private and public sector companies	Target 6
HE7		Improve occupational health knowledge and best practices management approach for clinical labor force	MOPH	ADLSA MEC QFC	Target 19
HE8		Develop a plan for the delivery of healthcare services that address the specific needs of blue-collar workers	QRC HMC	MOPH	Target 19
MHW1	Intermediate Outcome 4: Mental health and well-being	Improve epidemiologic data on mental health	MOPH	All healthcare providers MDPS MOF Health insurance companies QU Research entities	Target 6
MHW2		Raise public awareness about mental health and reduce the stigma associated with mental illness	MOPH	All healthcare providers MEHE MDPS Qatari media corporations Private media companies NGOs	Target 19

Code	Intermediate outcomes *	Project title	Implementing agencies	Supporting agencies	Project-related target(s)
MHW3		Expand high quality integrated mental health services within the community care framework	PHCC HMC	MOPH All mental healthcare providers All healthcare providers	Target 6
MHW4		Establish integrated mental health services	HMC PHCC	MOPH All healthcare providers Wayak	Targets 6 and 19
MHW5		Enhance inpatient mental health services	HMC	MOPH All mental healthcare providers	Target 6
MHW6		Develop new services to address the needs of the prisoners with mental health conditions	HMC	MOPH MOI	Targets 6 and 19
MHW7		Develop treatment, rehabilitation and post-care services for drug abusers	MOPH (Naufar)	HMC MOPH MOI	Targets 6 and 19
MHW8		Implement the Mental Health Law	MOPH	All mental healthcare providers MOI QCHP	Target 6

Code	Intermediate outcomes *	Project title	Implementing agencies	Supporting agencies	Project-related target(s)
MCC1	Intermediate Outcome 5: Improved health for people with multiple chronic conditions	Understand epidemiology of multiple chronic conditions and establish a registry for them	MOPH	MDPS All government and semi-government healthcare providers QU Weil Cornell medical college MEHE Research entities	Target 16
MCC2		Empower patients with multiple chronic conditions with knowledge and skills to improve their own health	PHCC	MOPH All healthcare providers Weil Cornell medical college	Targets 7, 11 and 16
MCC3		Enhance continuity and coordination of care	PHCC	MOPH All healthcare providers	Targets 7, 10, 11 and 16
MCC4		Implement clinical guidelines to support standardized high quality healthcare	MOPH	QCHIP All healthcare providers	Targets 7, 11 and 16
MCC5		Identify and address influencing factors for re-admission for people with multiple chronic conditions	HMC	All healthcare providers MOPH	Target 7

Code	Intermediate outcomes *	Project title	Implementing agencies	Supporting agencies	Project-related target(s)
SN1	<p>Intermediate Outcome 6: Improved health for people with disabilities and special needs</p>	Improve epidemiologic data on people with special needs	MOPH	All healthcare providers MDPS MEHE QF ADLSA	Target 8
SN2		Enhance the availability of special needs and high-quality disability services within care centers and community settings	MOPH	All healthcare providers ADLSA NGOs	Target 8
SN3		Expand extra-curricular activities for children with severe disabilities around sport and cultural activities	MOPH	MEHE MOCS NGOs	Target 8
SN4		Develop Occupational Rehabilitation Center specialized to train disabled teenagers to be able to work professionally	MOPH	All government and semi-government healthcare providers ADLSA MEHE NGOs	Targets 8 and 19
SN5		Enhance accessibility to special needs services, especially for children	MOPH	All healthcare providers	Target 8

Code	Intermediate outcomes *	Project title	Implementing agencies	Supporting agencies	Project-related target(s)	
SN6		Enhance services for children with disabilities after surgery and injury rehabilitation programmes	HMC	All healthcare providers MOPH	Targets 8 and 19	
SN7		Expand upon existing model for people with sensory impairments	HMC	All healthcare providers MOPH	Targets 8 and 19	
SN8		Enhance available family and family care-giver support services	MOPH	All healthcare providers ADLSA NGOs	Target 8	
SN9		Implement system for certifying that public facilities are accessible for people with mobility needs	MOPH	MME	Target 8	
SN10		Promote standardized care across sectors, including the private sector	MOPH	All healthcare providers	Target 8	
SN11		Improve chances of educational enrollment for children with special needs, especially in private schools	MOPH MEHE	NGOs ADLSA	Target 8	
HA1		Intermediate Outcome 7: Healthy ageing	Conduct population-based surveys to understand the epidemiology of the elderly population	MOPH	MDPS All government and semi-government healthcare providers MME Research entities QU	Target 9

Code	Intermediate outcomes *	Project title	Implementing agencies	Supporting agencies	Project-related target(s)
HA2		Increase health literacy/awareness	MOPH	All healthcare providers ADLSA MDPS QU	Targets 9 and 19
HA3		Enhance and coordinate services that promote healthy active aging	MOPH	HMC PHCC All healthcare providers MEHE MOCS	Targets 9 and 19
HA4		Introduce programmes to improve the elderly's mobility	MOPH	All healthcare providers MME MOCS	Target 9
HA5		Design and conduct National comprehensive Geriatric Assessments, including the private sector	HMC	MOPH All healthcare providers	Target 9
HA6		Design and implement policies and strategies that ensure easy accessibility of services	HMC	MOPH PHCC All healthcare providers	Target 9

Code	Intermediate outcomes *	Project title	Implementing agencies	Supporting agencies	Project-related target(s)
HA7		Develop community rehabilitation services and geriatric services	HMC	All healthcare providers MOPH	Target 9
HA8		Enhance processes that support continuity of care in geriatric services	PHCC	MOPH HMC All healthcare providers	Targets 9 and 19
HA9		Develop a nationally coordinated and integrated home care service	HMC, PHCC,	MOPH All healthcare providers	Targets 9 and 19
HA10		Monitor and address the needs of the cognitively impaired population	MOPH	MDPS All healthcare providers	Target 9
HA11		Expand culturally sensitive and compassionate long term care services	HMC	Home care providers All healthcare providers MOPH Health Insurance companies	Target 9

* Contents of the chapter are reviewed to identify the targets associated with the intermediate outcomes.

B. Projects within the priority framework at the level of health system:

Code	Intermediate outcomes *	Project Title	Implementing agencies	Supporting agencies	Project-related target(s)
IM1	Intermediate Outcome 8: Integrated system of high-quality healthcare service delivery	Improve timely access to health services	HMC PHCC	All healthcare providers	Targets 10, 11 and 12
IM2		Establish primary care services as the first and continuous point of appropriate access for the majority of healthcare needs based on a family medicine model of care	PHCC	MOPH All primary care providers	Targets 11 and 19
IM3		Improve health system processes to ensure continuity of care, thus treating patients at the appropriate level of care	MOPH HMC PHCC Sidra for medicine and research	All healthcare providers	Targets 11, 12 and 19
IM4		Establish and enhance integrated care programmes across the health system	MOPH	All healthcare providers; HMC PHCC Sidra for medicine and research	Targets 10, 11 and 12
IM5		Expand specialized and diagnostic services and facilities in community care environment	PHCC	HMC All healthcare providers MOPH Sidra for medicine and research	Targets 11 and 19

Code	Intermediate outcomes *	Project Title	Implementing agencies	Supporting agencies	Project-related target(s)
IM6		Establish national clinical networks with identified governance structure	MOPH	Government, semi-government and private healthcare providers private hospitals	Target 11
IM7		Improve coordination of care for high-risk patients	PHCC	All healthcare providers	Targets 10, 11 and 12
IM8		Efficient, effective and standardized management of high demand services	MOPH	All healthcare providers	Targets 11, 12 and 19
IM9		Implement and monitor standardized evidence-based clinical practices	MOPH	All healthcare providers	Targets 10 and 11
IM10		Enhance patient safety programmes to reduce preventable cases	MOPH	All healthcare providers QCHP	Targets 10 and 13
IM11		Integrate treatment abroad services within the comprehensive model of care and obtain best value from these services	HMC MOPH	PHCC HMC Sidra for medicine and research Aspetar Private hospitals	Target 10
IM12		Optimize current clinical information systems and implement digital healthcare solutions that support improving health outcomes	MOPH	All healthcare providers	Targets 10 and 11

Code	Intermediate outcomes *	Project Title	Implementing agencies	Supporting agencies	Project-related target(s)
HPD1	Intermediate Outcome 9: Enhanced health promotion and disease prevention	Improve epidemiologic data collection, monitoring, and surveillance of major risk factors for top causes of morbidity and mortality	MOPH	All healthcare providers MOI MEHE MME Health insurance companies Weil Cornell medical college Research institutions QU	Targets 10, 14, 15 and 16
HPD2		Enhance and coordinate health awareness programmes targeted at major health risk factors	MOPH	All healthcare providers Qatari media corporations Private media companies MEHE Weil Cornell medical college Research institutions QU	Targets 10, 14, 15 and 16
HPD3		Continue and expand national screening programmes for priority conditions	MOPH PHCC	All healthcare providers	Targets 10, 11, 14, 15 and 16

Code	Intermediate outcomes*	Project Title	Implementing agencies	Supporting agencies	Project-related target(s)
HPD4		Expand targeted programmes to improve outcomes related to top risk factors	MOPH	All healthcare providers MOI MEHE Qatar Media Corporations Private media companies MME	Targets 3, 14 and 15
HPD5		Raise awareness around dental and oral health	MOPH PHCC	All healthcare providers ADLSA Kahrama MEHE public and private schools universities Qatari media corporations Private media companies	Target 1
HPD6		Embrace new technologies and digital health solutions to conduct targeted health promotion programmes	MOPH	MOTC PHCC	Target 14

Code	Intermediate outcomes *	Project Title	Implementing agencies	Supporting agencies	Project-related target(s)
EHP1	Intermediate Outcome 10: Enhanced health protection	Strengthen the leadership role of MOPH in Health Protection	MOPH	All healthcare providers MME MEHE MOI MoTC	Target 19
EHP2		Enhance and strengthen surveillance and data management systems for health protection	MOPH	All healthcare providers MOI MDPS HIA	Target 17
EHP3		Strengthen communicable disease control for health protection	MOPH	All healthcare providers HIA Medical Commission Unit	Targets 13 and 17
EHP4		Implement a National Policy and Action Plan as "One Health Approach" to combat Anti-Microbial Resistance	MOPH	All healthcare providers MME WHO MoTC Qatar media corporations QCHP	Target 17

Code	Intermediate outcomes *	Project Title	Implementing agencies	Supporting agencies	Project-related target(s)
EHP5		Enhance Environmental Health Risks monitoring and regulation	MOPH	MME Kahrama	Target 17
EHP6		Strengthen and coordinate policies and regulations on Food Safety	MOPH FSA	MME	Target 17
EHP7		Implement the National Emergency Preparedness Plan, and enhance all-hazards approach to response readiness	MOPH	HMC All healthcare providers MOI	Target 17
HAP1	Intermediate Outcome 11: Health in all policies	Establish a policy to implement intersectoral Health Impact Assessment requirements	MOPH	MME MEHE MOI MoTC ADLSA Other ministries	Target 18

Code	Intermediate outcomes *	Project Title	Implementing agencies	Supporting agencies	Project-related target(s)
HAP2		Consolidate MOPH's leadership role in cross-agency health related policy direction and joint decisions	MOPH	All healthcare providers MME MEHE MOI MOTC ADLSA Other ministries	Target 18
HAP3		Develop a Health in All Policies approach for addressing major issues that concern all population	MOPH	MME ADLSA MOI MOTC Ashghal All healthcare providers	Targets 8 and 18
HAP4		Implement Healthy Cities approach in Qatar as per WHO criteria and requirements	MOPH	MME MOI MOTC Other ministries	Target 18

Code	Intermediate outcomes *	Project Title	Implementing agencies	Supporting agencies	Project-related target(s)
HAP5		Develop a national legislation and policy to implement water fluoridation	MOPH	MME Kahrama	Target 1
HAP6		Establish and maintain strong and enforced legal frameworks that protect, promote and support healthy nutrition	MOPH	MEC MME Weil Cornell medical college QU	Target 14
HAP7		Develop a Health in All Policies approach for addressing mobility needs	MOPH	MME ADLSA Ashghal All healthcare providers	Targets 8 and 18
ES01	Intermediate Outcome 12: Effective system of governance and leadership	Strengthen and empower Qatar Health system leadership	MOPH	All healthcare providers QCHP MEHE	Target 19
ES02		Strengthening MOPH role in leading the strategic direction and achieving integration in health sector work	MOPH	All healthcare providers QCHP MEHE ADLSA	Target 19

Code	Intermediate outcomes *	Project Title	Implementing agencies	Supporting agencies	Project-related target(s)
ES03		Enhance and monitor Quality of Patient Care and Safety	MOPH	All healthcare providers QCHP	Targets 10, 13 and 19
ES04		Strengthen and enhance efficiency of licensing processes	QCHP	MOPH	Target 19
ES05		Establish a framework that will incorporate both patient experience and public perspective into policy and service design	MOPH	MME	Target 19
ES06		Enhance the role of the private sector in meeting health needs of the population	MOPH	PHCC MEC Primary healthcare providers in the private sector and private hospitals	Target 19
ES07		Establish an effective system for healthcare facility planning and licensing based on healthcare service needs	MOPH	All healthcare providers MME MOI	Target 19
ES08		Enhance health workforce planning functionality to support the development of the sector	MOPH	All healthcare providers ADLSA	Target 19
ES09		Establish learning and development programmes for health professionals to support continuous development	MOPH	All healthcare providers ADLSA QCHP	Target 19:

Code	Intermediate outcomes *	Project Title	Implementing agencies	Supporting agencies	Project-related target(s)
ES10		Facilitate the design and implementation of recruitment programmes	MOPH	Government and semi-government healthcare service providers QCHIP MEHE	Target 19
ES11		Facilitate the design and implementation of retention programmes, including support functions	MOPH	Government and semi-government healthcare service providers QCHIP MEHE ADLSA	Targets 5 and 19
ES12		Review and update licensing regulations regarding health workforce	MOPH	QCHIP All healthcare providers MEHE	Target 19
ES13		Develop a plan that encourages volunteers to provide assistance in patient care areas	MOPH	Government and semi-government healthcare service providers QCHIP All healthcare providers MEHE	Target 19

Code	Intermediate outcomes *	Project Title	Implementing agencies	Supporting agencies	Project-related target(s)
ES14		Create a national knowledge platform, underpinned by a national data storage structure (data warehouse), governed by MOPH to enhance data accuracy and sharing	MOPH	All healthcare providers MOTC MOI	Target 19
ES15		MOPH to direct research around priority areas and population needs, and to support the academic health system model	MOPH	Research institutions PHCC QF Sidra for medicine and research HMC MEHE	Targets 10, 16 and 19
ES17		Establish a system that ensures policy and procedure development, support by a cost-benefit analysis	MOPH	Government and semi-government healthcare service providers	Target 19
ES18		Strengthen the centralization of support service functions to increase efficiency	MOPH	Government and semi-government healthcare service providers QCHIP ADLSA	Target 19
ES16		Strengthen the research management mechanism within the MOPH	MOPH		Target 19

Code	Intermediate outcomes *	Project Title	Implementing agencies	Supporting agencies	Project-related target (s)
ES19		Develop universal coverage models that support the model of care and deliver improved quality services	MOPH	Health insurance companies MOF	Target 19
ES20		Investigate alternative funding mechanisms for the health system	MOPH	MOF MEC QFC Health insurance companies	Target 19
ES21		Develop contracting and procurement processes that optimize efficiency and value	MOPH	Government and semi-government healthcare service providers Pharmacies and medical supply companies (producers and distributors) MOF	Target 19
ES22		Ensure the availability of necessary pharmaceuticals and medical supplies	MOPH	Pharmacies and medical supply companies (producers and distributors)	Target 19
ES23		Establish policies and regulations to obtain maximum value around pharmaceuticals and diagnostic services	MOPH	Government and semi-government healthcare service providers	Target 19

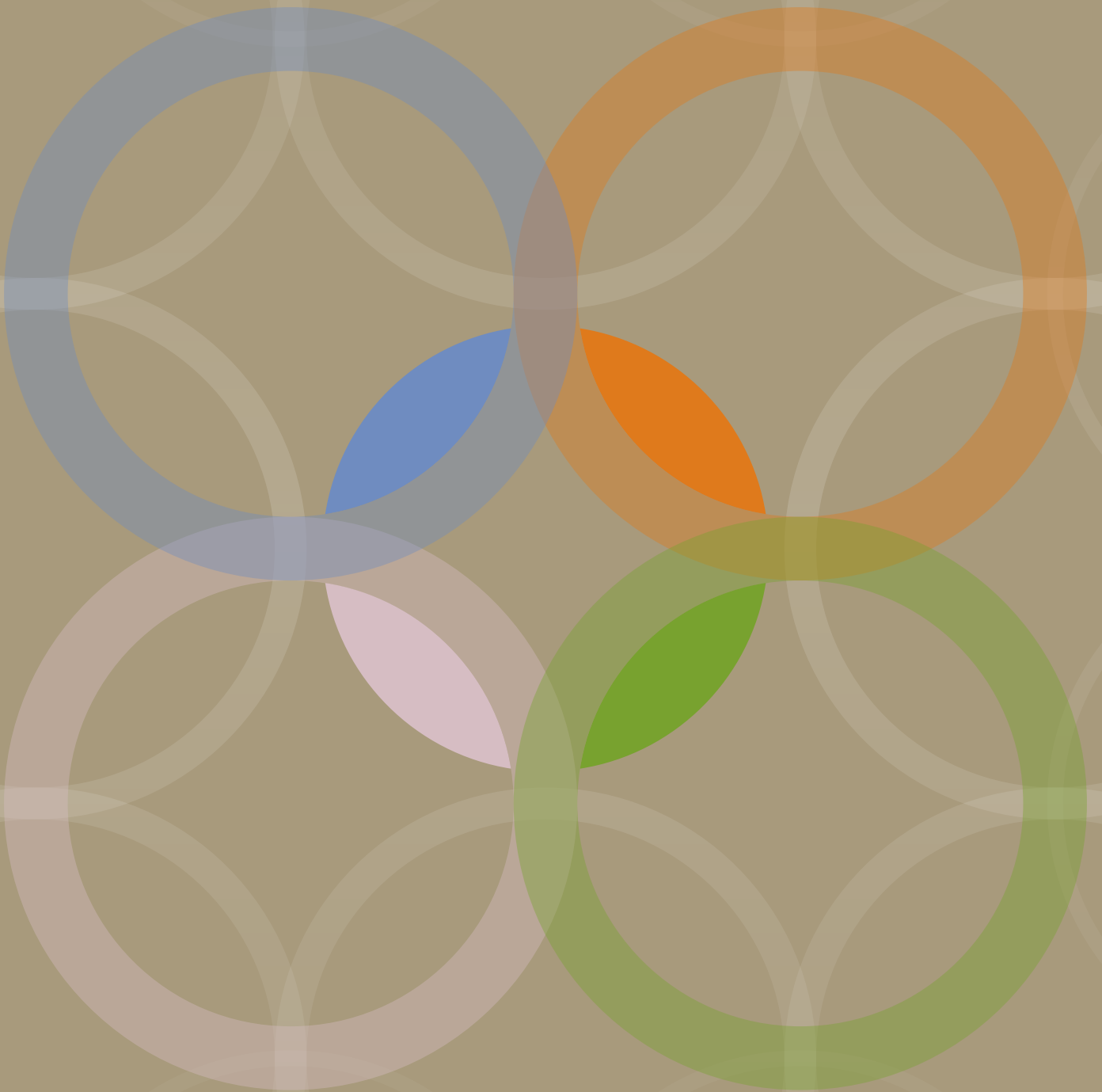
Code	Intermediate outcomes *	Project Title	Implementing agencies	Supporting agencies	Project-related target(s)
ES24		Develop improved Medical Technology Assessments (MTAs) to make sure that new technologies (including new pharmaceuticals) are adopted at the correct time and the benefits of adoption are actively managed – feasibility study, economic appraisal and continuous monitoring.	MOPH	All healthcare providers Health insurance companies Pharmacies and medical supply companies	Target 19
ES25		Establish proactive mechanism for optimizing current information systems and integrating new digital health solutions to improve health outcomes and service delivery	MOPH	MOTC All healthcare providers	Target 19

* Contents of the chapter are reviewed to identify the targets associated with the intermediate outcomes. Part IV: Promoting Human Development

Part IV: Promoting Human Development



Chapter II: Education and Training Quality



“We still face the challenge of development. I mean, first and foremost, human development. Humans are our most important asset and investment in education, health, infrastructure and others is linked to this task and through it our success in development is measured.”

H.H. The Emir, Sheikh Tamim bin Hamad bin Khalifa Al-Thani

1. Introduction

The education and training sector (ETS) is of great importance to the goals of human development, a pillar of QNV 2030. Considerable importance has been attached to the first Education and Training Sector Strategy (ETSS) and its development outcomes. Intensive consultations with stakeholders over a year have significantly contributed to the development of a coherent and inclusive ETSS that addresses challenges and builds on the achieved development outcomes, in addition to the support and advice of the World Bank and MDPS education teams. The current ETSS focuses on ETS priorities and uses outcome-based rather than project-based planning. The ETSS contains a range of programmes and projects that would contribute to the targets set in light of ETS development priorities. It also adopts supportive practices and working procedures to ensure goal achievement. The ETSS includes one main outcome and 15 intermediate outcomes broken down by the three levels of education, as well as ETS governance and planning. The levels are preschool education (including early childhood/pre-compulsory education), primary to secondary (k12) education (compulsory/elementary education, including secondary education, and technical and vocational education and training (TVET), and post-secondary education (including tertiary education and post-secondary TVET), as well as ETS governance and planning. The education levels address the subjects of enrollment, educational attainment, and ETS values and manpower.

2. Progress towards ETSS 2011-2016 outcomes and targets

The ETSS identified and sought to overcome many challenges facing the national education and training system by developing the appropriate policies and initiatives. These challenges included poor performance, particularly in math, science and English language, as reflected in students' scores in international exams; high absenteeism; low rates of transition from secondary to post-secondary education, especially for males; lack of professional qualifications of teachers other than a university degree; lack of classrooms necessary to accommodate the growing number of school students; lack of harmonization between the qualifications of university and college graduates and the needs of the labor market; poor linkage between K-12 education and post-secondary education; poor consistency among qualifications acquired abroad; low productivity of scientific research; and lack of data necessary for monitoring and policymaking.

The ETSS included 29 projects for the period 2011-2016. These projects aimed at activating education-related targets of the QNV's human development pillar. The Mid-Term Review (MTR) of the National Development Strategy (NDS) – developed by MDPS by the end of 2013 – showed a number of implementation challenges, including the lack of an operational plan to achieve the ETSS' sectoral outcomes, the absence of adequate representation of stakeholders other than the Supreme Education Council in the High-Level Supervisory Committee at the time, a need for the educational administration to adopt the early childhood and TVET sectors, and the adoption of an overly ambitious project agenda that did not prioritize projects and did not take their overlapping into account. There is also an urgent need to build more capacity and expertise on project implementation, follow-up and quality assurance, and to develop an education and training policy.

Most of the original targets of the ETSS 2011-2016 were reviewed in light of the emerging circumstances and two new

initiatives were added: the first is the provision of more high-quality early childhood education opportunities, which constitute a solid foundation for K-12 education. The second is ensuring that students acquire literacy and numeracy skills appropriate to their age in the first three years of school and later in years of transition from one educational stage to another, in addition to ETSS initiatives led by the Ministry of Education and Higher Education (MEHE). Many partners, such as Qatar University (QU), Qatar Foundation for Education, Science and Community Development (QF), College of the North Atlantic-Qatar (CNA-Q), Community College of Qatar (CCQ) and other joint sectors directly or indirectly contribute to achieve the goals of the QNV 2030 and ETSS 2017-2022 targets.

The ETS sought to achieve the ETSS targets by the end of 2016, including the development of a national Qatari qualifications framework; the development of higher education quality assurance systems, including the approval of the establishment of a Qualifications and Accreditation Office; and the development of a comprehensive national curriculum framework for public schools to allow for more harmonized curricula, take into account individual differences among students within the learning process, and include the 21st century competencies throughout all school curricula. Some progress was made in many aspects of improving student outcomes in basic subjects. An Educational Training and Development Center was established with a view to expanding and improving the quality of professional development opportunities for teachers and school principals, in addition to the opening of the first early childhood center (Bedaya Center) with government funding. There was also progress in providing services to students with special needs through the opening of Roua Center in April 2015 to conduct student educational assessments, with the opportunity to have an integrated approach, supported by a medical assessment by the staff of the Rumaila Hospital. Moreover, the first kindergarten for students with additional educational support needs was inaugurated in September 2015.

Limited progress was also made towards monitoring progress, supporting evidence-based planning, developing policy and decision-making, and ensuring a comprehensive database, for example, to access all early childhood, higher education and labor market data. Progress was very limited with regard to the establishment of TVET governance systems responsible for strategic direction and coordination, in addition to lowering the start age of compulsory education below six years as was decided by the end of 2016, but this has not so far been done. Some projects with limited progress were moved to the ETSS 2017-2022, such as the establishment of a comprehensive data system.

In the area of governance, restructuring the MEHE has led to the strengthening and development of the provision of specialized educational services for early childhood and special education through the establishment of an Early Childhood Department and a Special Education and Talent Sponsorship Department.

3. ETS challenges (2018-2022)

Much more clearly needs to be done so that Qatar can meet international standards and have the student outcomes needed to fully achieve its vision of a well-educated population able to support economic diversification and develop a knowledge economy. Thus, it will be necessary in the ETSS 2017-2022 to step up efforts to improve student outcomes. The existing and emerging challenges according to economic and demographic data are as follows:

Human capital development under the existing economic environment

The success of Qatar's efforts to diversify the economy in accordance with QNV 2030 will largely depend on the success of its human capital development. Therefore, this goal will remain a national priority in order to advance education quality, engage learners and ensure a sustained education process. Economic diversification in Qatar will only be a success when ETS efforts to develop human capital succeed. The civil service sector may not be able to continue to absorb the same numbers of jobseekers as

in the past, especially since there has been a growth in the numbers of citizens of working age, which means that large numbers of them may return to education over time. A short-term challenge is the inability to develop human capital to keep pace with labor market demands and national development priorities. Moreover, TVET options have not demonstrated ability to attract and retain Qataris, in addition to an insufficient number of graduates of knowledge economy disciplines, including technological education, science and engineering programmes, as well as their weak levels compared to international standards. Thus, many graduates have become insufficiently equipped to meet the private sector's requirements of practices and values. Accordingly, the private sector may have to absorb more Qataris in order to facilitate the country's transition to a knowledge-based economy.

Demographic projections and planning process

The demographic provisions are vague, particularly with regard to the future increase in the number of resident school-age children until 2022 when Qatar hosts the FIFA World Cup. This may make the planning process difficult. The high and unsustainable level of population growth is primarily due to the continued large influx of foreign workers resulting from an uncontrolled response to the requirements of labour market and infrastructure projects. There has also been a noticeable increase in the influx of expatriate families with school-age children. This growth in the school-age population has significantly increased demand for the education system which is expected to provide the required educational opportunities at the highest possible quality. This will entail the need to provide necessary funding, human resources and infrastructure, with effective use of resources to maintain education quality.

ETSS governance and management

ETS institutions operate separately and lack governance mechanisms that promote coordination. For example, there is no coherent strategy or mechanism to expand and improve the quality of pre-school education, while public and private schools operate almost independently. Similarly, sub-sectors of higher education (e.g. QU, QF and some other colleges) operate almost completely independently of each other in planning and delivery of educational programmes and research efforts. Meanwhile, it is difficult to access accurate ETS data, resulting in the inability to follow-up on performance indicators that are important for planning and decision-making, in addition to the sectoral projects and programmes that are planned and implemented without coordination – and the ensuing duplicate efforts and inefficient education spending.

4. ETS Main outcome, intermediate outcomes and specific targets (2018-2022)

Main outcome

ETS development programmes and projects will contribute to one main outcome: **“A world-class education system that offers equitable access to high-quality education and training, equips all learners with the necessary skills and competencies to realize their potential in line with their ambitions and abilities to contribute to society, strengthens Qatar’s values and heritage, and calls for tolerance and respect for other cultures.”** Achieving this outcome will be based on 15 intermediate outcomes that are broken down to three educational stages as well as the ETS planning and quality. This includes four main pillars:

- **Enrollment:** This pillar shows the ability of the education system to provide all learners at different education levels with learning opportunities regardless of age, sex and abilities.
- **Attainment and achievement:** It shows the rates of attainment and academic achievement of all learners at different education levels.

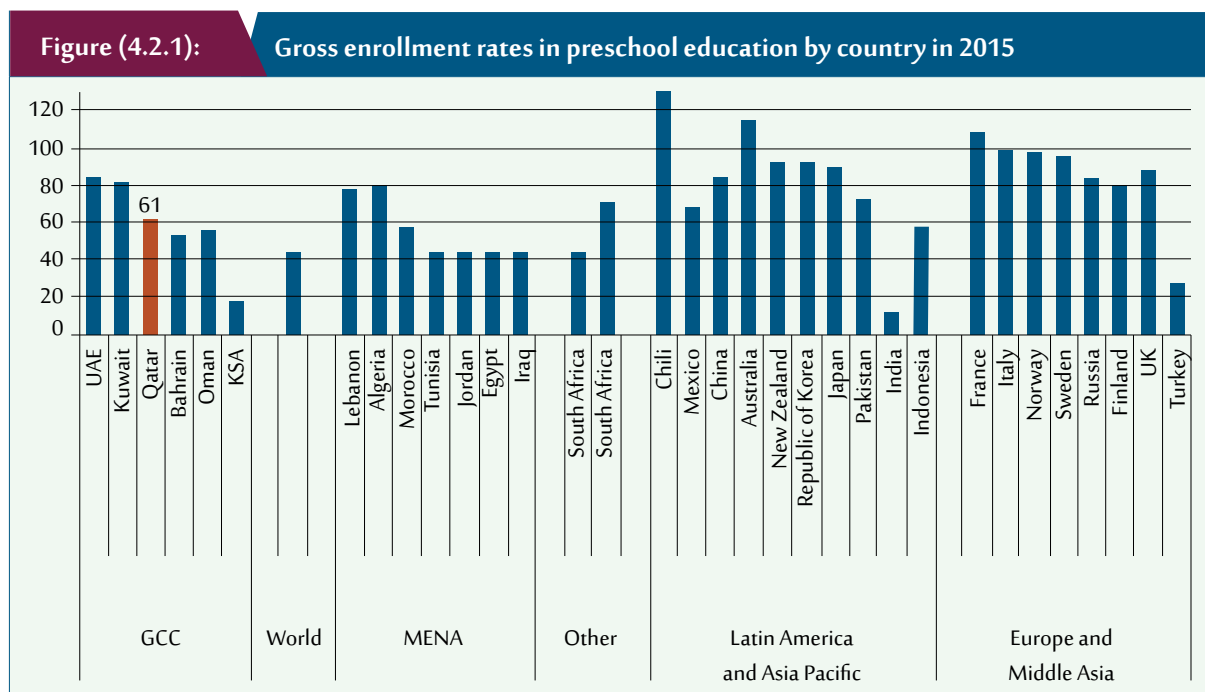
- **Citizenship and values:** It shows how well learners appreciate the values, culture and heritage of Qatari society while understanding and respecting other cultures.
- **Labour force:** It focuses on the skills, effectiveness and efficiency of the ETS labour force at the various educational levels.

Preschool education

Intermediate outcome 1: Provide all children with equitable access to high-quality early learning programmes regardless of sex, age and abilities.

Early childhood education is defined as the education targeting children aged 0 to 8 years. It is divided into three stages: 0-4 years (nursery) under the Ministry of Administrative Development, Labour and Social Affairs (ADLSA) umbrella, 4-6 years (kindergarten and preschool) and 6-8 years (first grade through third grade), both being under the Ministry of Education and Higher Education (MEHE) umbrella. Many extensive studies over the years show that high-quality early childhood programmes that are suited to the stages of child development strengthen intellectual and social capacities, increase readiness for school, improve education outcomes, and have lifelong benefits for both individuals and society. Investment in early childhood is cost-effective, and it also reflects the State's perspicacity in resource utilization.

Although Qatar experienced an increase in the gross enrollment rate in early education (62% in 2015), 40% of children aged 3-5 years did not enroll. International benchmarks (Figure 4.2.1) show that the overall proportion of early education children in Qatar remained lower than in Europe, Asia and even regional counterparts, such as the UAE and Kuwait.⁵⁴ To achieve this outcome, the Strategy will focus on improving the quality of pre-school education to enhance importance of this stage, through codifying and unifying a comprehensive approach to early childhood services, increasing enrollment rates in early education to become more consistent with international standards, developing early childhood policies and strategy, developing a comprehensive monitoring and follow-up database, and launching awareness campaigns to encourage enrollment in early learning centers (nurseries or kindergartens).



Source: MEHE and UNESCO Institute for Statistics (UIS), 2015.

54 World Bank, Education and Training Sector Report for the NDS 2018-2022, unpublished.

- **Target:** Increase the enrollment rate of children aged 3 years in formal nurseries and children aged 4 and 5 years in formal early childhood education programmes by 10% to become 72.5% in 2022 (2% per annum).

Intermediate outcome 2: Develop children's cognitive, social, emotional and physical capacities in early years to improve readiness to move from home to compulsory education.

Qatar has made great efforts to assess the educational process both internally and externally in terms of its educational objectives, curricula, teachers' effectiveness, training methods, student outcomes, effectiveness of educational tools and efficiency of school buildings to determine the effectiveness and role of school programmes in translating educational objectives into behavioral activities in order to create educational talents capable of productively dealing with life and to develop the ability to acquire constructive and productive experiences. However, the pre-school assessment process has not received the same attention due to the recent creation of the Early Education Department that is responsible for it. Thus, a survey will be conducted to measure and assess all aspects of child personality development, in addition to developing early childhood policies and strategy.

- **Target:** Develop assessment tools for children's learning and development at the end of their pre-school education (end of kindergarten stage) and start implementing them as of the academic year 2018-2019.

Intermediate outcome 3: Increase all children's awareness and pride of Qatar's values and heritage, while promoting tolerance, understanding and respect for other cultures and people.

The Qatari society has been exposed to many new influences in the past two decades, due to the ever-growing number of expatriates working and living in Qatar. Despite the fact that the presence of many expatriate communities helps provide a broad perspective of different cultures and lifestyles, it is a challenge to Qatari traditional values established in the Arab and Islamic culture. For this reason, the QNV 2030 stipulates that education must contribute to "A solid grounding in Qatari moral and ethical values, traditions and cultural heritage,"⁵⁵ especially with the successive developments in technology and globalization. In this context, the teaching of Arabic language and Islamic and Qatari history has been imposed at all levels of education up to the twelfth grade. Although this principle is fundamental and a prime objective in the current curricula and in the messages of educational institutions under the value education and family culture framework in the primary education system, it still needs additional and integrated actions to entrench the values that are at the heart of Qatari society and Qataris. To achieve this outcome, a national strategy will be developed to reinforce Qatar's values and culture and to promote tolerance and acceptance of other cultures in government and private early childhood education centers through reviewing curricula, teacher training programmes and school activity plans.

- **Target:** Develop tools to measure children's understanding of Qatari and global citizenship, assess how well they apply positive values, and start implementation by 2019.

Intermediate outcome 4: Improve the quality and performance of early childhood education staff.

In the academic year 2014-2015, the number of preschool students was 42,615, and they were taught by 3,008 teachers, including 718 Qataris or 23.8%. Teaching at this level is almost exclusively done by women regardless of nationality (less than 1%)⁵⁶. Despite the efforts of several State actors (including Qatar University (QU), Community College Qatar (CCQ) and Qatar foundation (QF) to train early education teachers, traditional teaching methods are still used where teachers rather than children are the focus of the learning process. School principals, teachers and staff of private nurseries and kindergartens,

55 General Secretariat for Development Planning, QNV 2030, 2013, p.13.

56 MDPS, 2017.

often non-professionals, need vocational training opportunities to acquire the needed knowledge and pedagogical skills. To achieve this outcome, the government will intensify educational/qualification programmes and professional development opportunities for early-learning teachers and principals to develop practices and improve quality.

- **Target:** Increase the proportion of early childhood female teachers (Qatari and non-Qatari) with formal early education qualifications in public kindergartens by 12% to become 20% in 2022 (3% per annum).

Grades 1-12 education

Intermediate outcome 5: Provide all learners with equitable access to high-quality primary and secondary education regardless of sex, age and abilities.

The growth in the number of students in primary and secondary education was relatively moderate in independent schools. While the majority of students in independent schools are Qataris, the share of non-Qataris is growing. Private schools have had steady growth in the students' number, but for different reasons, including expanding the education voucher programme – launched in 2008 – to include all Qataris in 2012. A tendency to enroll in private schools existed before the voucher system. The phenomenal growth in the number of non-Qataris in private schools reflects the increasing number of children of expatriate workers in the country. The net enrollment rate in primary and secondary schools during the academic year 2014-2015 was 89.4% (86.6% for males and 90.3% for females)⁵⁷. The gross enrollment rate in secondary TVET in Qatar is low compared to that of the OECD and of the GCC states except Bahrain.⁵⁸ In the academic year 2016-2017, the number of specialized secondary students in Qatar was only 1,148, with a majority of 95.4 % male students (Table 4.2.1).

Specialized Schools	Qatari			Non Qatari			Total
	M	F	Total	M	F	Total	
Religious Inst.	31	0	31	442	0	442	473
Technical Sec	425	0	425	34	0	34	459
Business & Banking	149	49	198	14	4	18	216
Overall Total	605	49	654	490	4	494	1148

Source: Ministry of Education and Higher Education, 2017.

To achieve this outcome, the government will provide adequately equipped infrastructure necessary to accommodate all students in public and private schools irrespective of sex, abilities and nationalities, taking into account the establishment of specialized and vocational schools that contribute to diversifying learners' options according to the country's needs and orientations.

- **Target:** Increase the proportion of resident students (aged 6-18 years) enrolled in the three stages (primary, preparatory and secondary) by 5% till 2022.

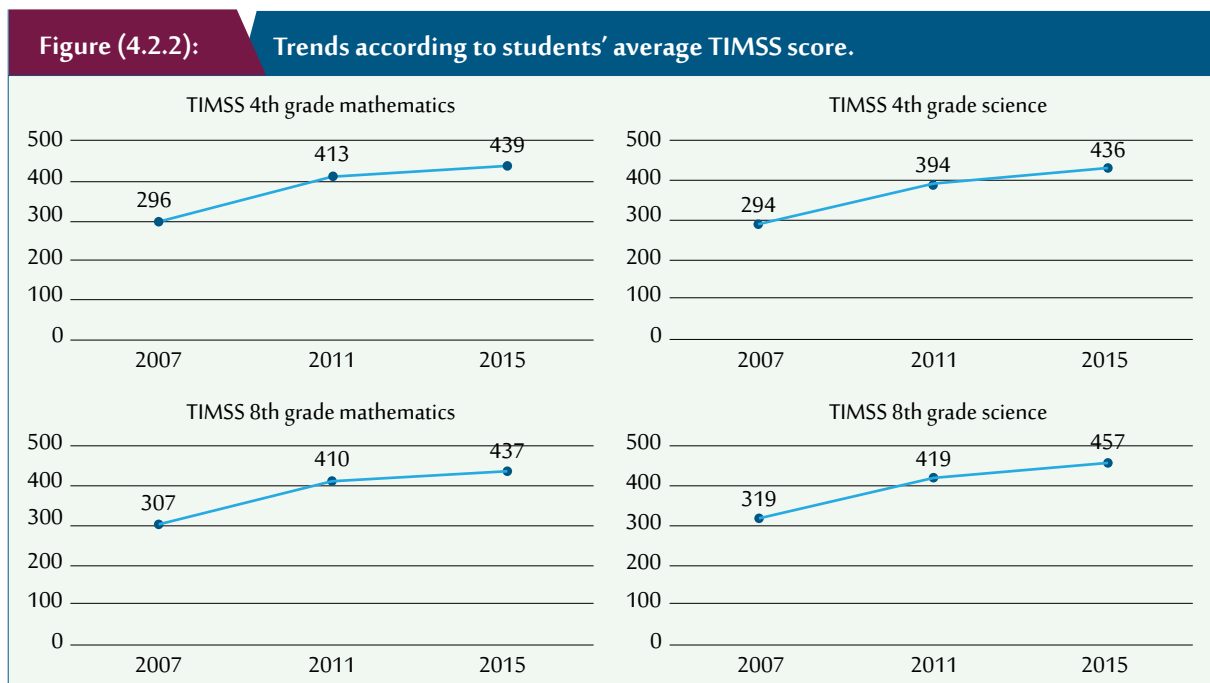
⁵⁷ Ibid.

⁵⁸ Ibid.

Intermediate outcome 6: Improve student outcomes at a rate that suits each stage of basic education to ensure a successful transition to post-secondary education.

Despite its efforts to advance student learnings, Qatar still ranks lower than expected in international tests, which raises concerns given the resources invested in this area.

In the Trends in International Math and Science Study (TIMSS) of math test for fourth graders in 2015, only 3% of Qatari students got the highest scores compared to 6% internationally, while 35% failed to achieve the minimum level, compared to 7% internationally.⁵⁹ It is clear therefore that primary to secondary education objectives must primarily focus on a substantial improvement in student outcomes, especially among Qatari students whose performance is below international standards.



Source: WB, ETSS Report 2017-2022, unpublished.

To achieve this outcome, the government will find pathways and areas of cooperation between the high and low-performing schools; measure and promote qualitative improvement resulting from teachers' capacity development; enhance and promote training and mentoring for teachers; facilitate teaching and learning methods that take into account individual differences through inclusion in educational manuals, teaching materials, curricula and teacher training programmes; review the time of students' participation; focus on the fact that all students should have basic literacy and numeracy skills during their first years of study; implement communication strategies for social and behavioral change; and review the role of specialized education and determine its purpose in secondary schools and future orientation.

- **Target:** By 2022, increase the performance rate of students who achieve 70% or higher in the basic subjects of math, science, Arabic and English by 3% in grades 3 and 6 and 6% in grades 9 and 12.

Intermediate outcome 7: Improve learners' 21st century competencies necessary for life and employability.

The term "21st century competencies" refers to a range of knowledge, skills, attitudes, and personal qualities believed to play

59 MEHE, ETSS 2017-2022.

a crucial role in success in today's world, especially in higher education programmes, modern professions and workplaces. Generally speaking, the 21st century competencies can be applied to all disciplines of academic and educational knowledge, functions and civil frameworks throughout the student's life. In this context, the general framework of Qatar's educational curricula has been developed and implemented. It "seeks to entrench a set of QNV 2030 values, principles and goals through a range of study subjects, common issues and additional methodological competencies and activities. The framework is a reference for all actions taken in the educational field. It shows the contribution of all partners in the education process, and it is scalable and updatable according to the developments of the educational system."⁶⁰ To achieve this outcome, curricula will be revised based on the framework, teachers will be trained on it, all education partners will be sensitized, and the existing evaluation mechanism will be reviewed.

■ **Target 1:** Increase the average score of students from Qatar in the international tests that include Progress in International Reading Literacy Study (PIRLS), TIMSS and Programme for International Student Assessment (PISA) at a minimum rate of 30 points per round.

■ **Target 2:** Reduce grades 1-12 average absenteeism rates by 5% (1% per annum).

Intermediate outcome 8: Increase all grades 1-12 learners' awareness and pride of Qatar's values and heritage, while promoting tolerance, understanding and respect for other cultures and people.

The Qatari society has been exposed to many new influences in the past two decades, due to the ever-growing number of expatriates working and living in Qatar and having diverse cultures that may affect Qatar's national identity. To address this, the teaching of Arabic language and Islamic and Qatari history has been made mandatory throughout general education up to the twelfth grade. Although this principle is fundamental and a prime objective in the current curricula and in levels of educational institutions under the value education and family culture framework in the primary education system, it still needs additional and integrated actions by all educational and training sectors. To achieve this outcome, the government will implement the educational ethical charter, the government and private curriculum development project and teacher training programmes.

■ **Target:** Develop tools to measure students' understanding of Qatari and global citizenship, assess how well they apply positive values, and start implementation by 2019.

Intermediate outcome 9: Improve the quality and performance of primary to secondary education staff.

In the academic year 2014-2015, there were 20,116 primary to secondary teachers, of which 16.6% were Qataris. Qatari schools (primary, preparatory and secondary) provided various activities to develop teachers' skills, such as seminars on teaching methods, training with teachers from other schools, recruitment of specialized teachers and organization of visits to experienced teachers' classes. Schools provided these services at 97%, 74%, 61% and 97% respectively.⁶¹

Available evidence indicates that the main driver of change in students' learning at school is teachers' quality. Furthermore, studies on teachers' effectiveness indicate that students taught by high-performing teachers perform three times better than those taught by poor-performing teachers. In addition, the negative impact of low-performing teachers is particularly serious

60 <http://www.edu.gov.qa/Ar/Media/News/Pages/NewsDetails.aspx?NewsID=9258>.

61 <http://www.edu.gov.qa/Statistical%20Report%20AR/2014-2015.pdf>.

in the early stages of education.⁶² Ultimately, education depends on teachers' quality. Therefore, distinct education systems constantly attract the most capable teachers, leading to better student outcomes. This is achieved through a rigorous selection of potential teachers, equipping them with the necessary skills, giving them remunerative salaries, and providing them with the necessary professional development opportunities.

To achieve this outcome, the government will expand the "Student Care Programme" in cooperation with the Faculty of Education at QU, intensify training programmes for primary to secondary teachers and principals by strengthening the role of the MEHE's newly established Training and Educational Development Center, attract and retain highly qualified teachers and principals, increase the number of general teachers in primary education, reduce the number of specialized teachers, and reduce non-scholastic burden on teachers.

- **Target 1:** Increase the percentage of teachers with appropriate and recognized teaching qualifications (diploma or bachelor of education) in public schools by 10% (2% per annum).
- **Target 2:** Increase the number of teachers with professional licenses in public schools by 30% (6% per annum).

Post-secondary education

Intermediate outcome 10: Provide all learners with equitable access to high-quality post-secondary education and training programmes regardless of sex, age and abilities.

ETS stakeholders and partners have agreed that the most appropriate term for this level of education is "post-secondary education," especially since it covers TVET, lifelong learning goals as well as higher or tertiary education. Post-secondary education faces several challenges, including the fact that the existing higher TVET institutions are not governed and their activities are not organized in a unified and coordinated manner. Four subsectors in Qatar operate independently with limited coordination and cooperation. QU operates in a semi-autonomous manner, while CCQ, CNA-Q, the University of Calgary in Qatar, and the Doha Institute for Graduate Studies operate under the MEHE. Also, many prestigious universities operate under QF, and other colleges operate under government agencies and ministries.

To achieve this outcome, the government will further coordinate among higher education institutions in the sector; apply standardized quality criteria to assess their quality; provide various methods and means, including e-learning, to enhance access to quality higher education programmes, lifelong learning and continuous professional development; increase the proportion of Qatari faculty staff and researchers in post-secondary institutions; provide role models for further development and improvement; and advance the quality of post-secondary education programmes and disciplines through approved quality systems.

- **Target:** Increase the rate of Qataris' enrollment in post-secondary education by 5% among females and 10% among males by 2022⁶³.

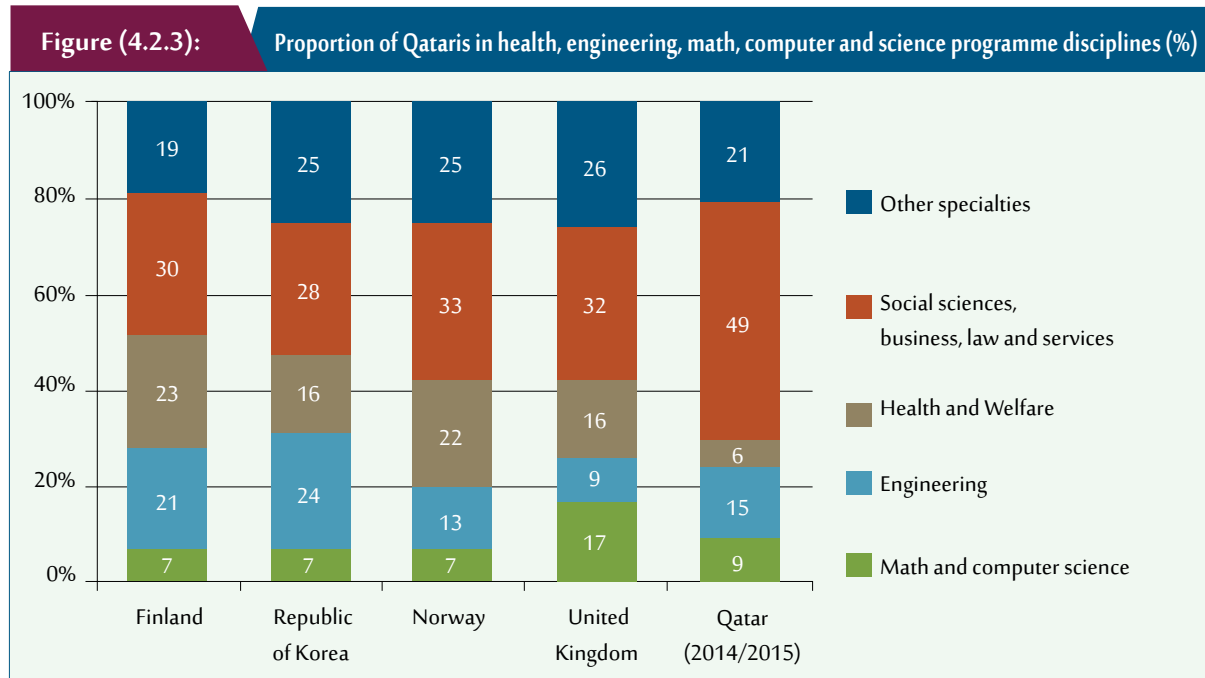
Intermediate outcome 11: Improve student outcomes and graduation rates in tertiary and postgraduate programmes as well as in post-secondary TVET programmes.

Math, science and physics are the main entry points for a knowledge economy. The enrollment rate in these disciplines at QU was only 15% and 18% of Qatari graduates and master's students of science, math, engineering and technology programmes

⁶² <http://www.smhc-cpre.org/wp-content/uploads/2008/07/how-the-worlds-best-performing-school-systems-come-out-on-top-sept-072.pdf>, p.13.

⁶³ MDPS statistics.

in the academic year 2013-2014⁶⁴. Although recent years have witnessed a slight rise in these proportions, they are far less than ambition. Qatar still needs to increase the proportion of those enrolled in disciplines associated with the knowledge economy compared with some selected developed countries (Figure 4.2.3)



Source: MDPS (2017), QU (2016) and UIS (2017).

To achieve this outcome, enrollment rates in post-secondary education will be increased, especially among males, in addition to increasing graduation rates; number of students graduated within established time; number of graduates of science, technology, engineering and math disciplines; and number of Qataris with postgraduate degrees (master and doctorate) in general, and in scientific disciplines in particular.

- **Target 1:** Increase the graduation rate among male and female Qatari post-secondary students by 10% by 2022.
- **Target 2:** Raise the graduation rates among male and female Qatari students in knowledge economy disciplines (math, science, IT and engineering) by 10% by 2022.

Intermediate outcome 12: Increase all post-secondary learners' awareness and pride of Qatar's values and heritage, while promoting tolerance, understanding and respect for other cultures and people.

The Qatari society has undergone many new influences over the past two decades due to increasing numbers of expatriates who work and live in Qatar and have different cultures. Universities and higher education institutions play a leading role in promoting the commitment to community values. Thus, QU has made Arabic language a mandatory course for all students and ceased the Academic Bridge Programme. It has further started teaching most disciplines in Arabic⁶⁵ and adopted Arabic as the official language in its correspondence and meetings. While adherence to national values is a fundamental principle, it still needs additional and complementary action by all sectors of education and training to entrench values that are at the heart and

64 MEHE, Education and Training Sector Report for the Second NDS 2018-2022, unpublished document.

65 MDPS, 2017

mind of Qatari society and Qatari people. To achieve this outcome, the government will develop a national strategy to promote Qatar's values and culture, spread tolerance and acceptance of other cultures at government and private universities and higher education and TVET public and private institutions, and enrich the educational process at universities and faculties through integrating Qatari arts and heritage into their curricula, educational programmes, student activity plans and alumni associations.

- **Target:** Develop tools to measure students' understanding of Qatari and global citizenship, assess how well they apply positive values, and start implementation by 2019.

Intermediate outcome 13: Improve the quality and performance of post-secondary education and training staff.

The number of teachers in higher education institutions during the academic year 2014-2015 was 2,184, of which 11% were Qataris.⁶⁶ The share of faculty staff in government colleges and universities was 56%. Qataris are concentrated in government universities and colleges, while the teachers in private universities and colleges are mainly expatriates.⁶⁷ A major challenge facing the labor force in this sector is how to attract and retain Qatari teachers, particularly in the fields of math, science, engineering and technology. To achieve this outcome, the capacity and potential of post-secondary education staff will be developed through the development of policies and procedures of recruitment, career development, retention and performance management; encouragement of Qataris to clearly contribute to the sector; and establishment of a governance structure for different education and training pathways to facilitate the development of a strategic direction, coordinate activities and improve quality.

- **Target:** Increase the proportion of Qatari faculty staff in post-secondary education institutions to 13%, by 2022 (2.2% per annum).

Governance

Intermediate outcome 14: Improve governance, planning, policy development,- decision-making and accountability procedures in the ETS.

The developments in the ETS in the last decade have led to a significant improvement in the availability of reliable data on education and training through data production/collection programmes and projects, such as the Qatar Comprehensive Educational Assessment (QCEA), the Statistical Bulletin on Education in Qatar, the National Pedagogical Information Network, the results of international tests and the follow-up and evaluation evidence and indicators provided by the evaluation programmes of the education system. However, there are gaps in information about private schools, training centers, lifelong learning programmes, in addition to gaps in disaggregated data on learning outcomes and factors influencing the teaching and learning processes. Also, information on best education practices, training programmes and policies in GCC countries that can help guide ETSS projects are not readily available.⁶⁸ Existing education and training databases are not sufficient to monitor progress towards ETSS target values, and their quality is not always guaranteed. Moreover, performance indicators are neither quantitatively nor qualitatively sufficient to support evidence-based policymaking to promote the development of the sectors concerned. A culture of data sharing in the sector also needs to be developed.

This outcome will be achieved through activating outcome-based planning and policy-making, developing a comprehensive early education database to follow-up on relevant developments, identifying procedures for periodic review of the effectiveness

⁶⁶ Data do not include teachers in military and police colleges or the Doha Institute for Graduate Studies.

⁶⁷ www.mdps.gov.qa/en/statistics/Statistical%20Releases/Social/Education/2015/Soc_Education_Chapter_AnAb_AE_2015.pdf

⁶⁸ MDPS, and the Supreme Education Council, MTR Report for the First NDS 2011-2016, p.54.

and efficiency of the information system to ensure that it meets informational needs, developing official links with all information providers, coordinating between the vertical and horizontal components of the education and training system, establishing a mechanism to track and assess progress towards strategic goals and objectives, properly activating accountability procedures to ensure results, properly planning and implementing projects, ensuring integration among all sector institutions, fully implementing the National Qualifications Framework in Qatar; and establishing an administrative structure for the various TVET pathways.

■ **Target:** Develop a system and a comprehensive mechanism for ETSS governance and start implementation by 2018.

Intermediate outcome 15: A clear and more effective and efficient mechanism for spending and resource allocation in the ETS.

The higher authorities in Qatar continue to give priority to the education sector in order to achieve the human development targets of the QNV 2030. That priority was reflected in HH the Emir Sheikh Tamim bin Hamad bin Khalifa Al-Thani's directives: "In preparing the annual budget for 2014/2015, enhancing the efficiency of government expenditure has been taken into account, with a significant portion of the increase in expenditures being directed to the implementation of major projects in the health, education, infrastructure and transport sectors. Total investment in these projects will be over 50% of total expenditures in the general budget for this year."⁶⁹

Government expenditure on education in the academic year 2014/15 amounted to nearly QAR 25 billion or 11% of the State budget for the same year. This share has been almost stable over the past five years. However, the recent decline in oil and gas prices indicates that Qatar needs to increase the efficiency and effectiveness of its government expenditure and to reduce subsidies and allowances. In light of these financial pressures, the education services need to pay more attention to cost-effectiveness. To achieve this outcome, the government will develop a plan to improve spending efficiency in the management of public schools, while reviewing and revising the education voucher system in private schools without adversely affecting the education quality.

■ **Target:** Develop a framework to improve efficiency of the ETS spending by examining the current mechanisms of budget/resources allocation, and propose solutions and start to apply them by 2019.

5. Conclusion

The success of the NDS-2 education and training initiatives is based on the QNV 2030 and guidance from the leadership. This has been evident since the inception of the NDS-1. Success will also depend on the implementation of a comprehensive approach that is integrated vertically within the ETS and horizontally across the ETS, labor market, family and social protection, health and the like, as well as on the availability of data needed for monitoring, follow-up and evaluation. This strategy includes significant contributions by several ETS stakeholders, including the meetings of the sectoral task team and its sub-groups, which has reflected coordination among these actors. This is consistent with the directives of HH the Emir, Sheikh Tamim bin Hamad bin Khalifa Al-Thani, when he said: "Here, I would like through you to tell the ministers and all NDS personnel inside the government and beyond that the headlines I have mentioned are goals that can be reached using a clear action plan with clear indicators and standards to measure implementation progress. I, therefore, emphasize the need to fill gaps in the planning framework, improve sectoral and cross-sector coordination, and focus on outputs and outcomes."⁷⁰

69 H.H. the Emir speech at the opening of the 44th session of the Shura Council on November 3, 2015.

70 H.H. The Emir speech, op. cit

6. Annex

The intermediate outcomes, targets, interventions and implementing agencies that contribute to the main outcome: “A world-class education system that offers equitable access to high-quality education and training, equips all learners with the necessary skills and competencies to realize their potential in line with their ambitions and abilities to contribute to society, strengthens Qatar’s values and heritage, and calls for tolerance and respect for other cultures.”

Intermediate outcomes	Specific Targets	Programmes/ Projects	Implementing agencies	Supporting agencies
Pre-school education (1): Provide all children with equitable access to high-quality early learning programmes regardless of sex, age and abilities.	1.1 Increase the enrollment rate of children aged 3 years in formal nurseries and children aged 4 and 5 years in formal early childhood education programmes by 10% to become 72.5% in 2022 (2% per annum).	Increase number of children in quality early education programmes regardless of sex, age or ability.	MEHE	MADLSA QF
Pre-school education (2): Develop children’s cognitive, social, emotional and physical capacity in early years to improve readiness to move from home to compulsory education.	2.1 Develop assessment tools for children’s learning and development at the end of their pre-school education (end of kindergarten stage) and start implementing them as of the academic year 2018-2019.	Develop children’s cognitive and social capacity and physical and emotional well-being and improve their readiness for school in their early years.	MEHE	QF QU
Pre-school education (3): Increase all children’s awareness and pride of Qatar’s values and heritage, while promoting tolerance, understanding and respect for other cultures and people.	3.1 Develop tools to measure children’s understanding of Qatari and global citizenship, assess how well they apply positive values, and start implementation by 2019	Develop children’s cognitive and social capacity and physical and emotional well-being and improve their readiness for school in their early years.	MEHE	QF QU MOCS Katara
Pre-school education (4): Improve the quality and performance of early childhood education staff.	4.1 Increase the proportion of early childhood female teachers (Qatari and non-Qatari) with formal early education qualifications in public kindergartens by 12% to become 20% in 2022 (3% per annum)	Improve the quality and performance of early childhood education staff.	MEHE	QU CCQ QF

Intermediate outcomes	Specific Targets	Programmes/ Projects	Implementing agencies	Supporting agencies
Primary to secondary education (5): Provide all learners with equitable access to high-quality primary and secondary education regardless of sex, age and abilities	<p>5.1 Increase the proportion of resident students (aged 6-18 years) enrolled in the three stage (primary, preparatory and secondary) by 5% till 2022.</p> <p>6.1 By Target: By 2022, increase the performance rate of students who achieve 70% or higher in the basic subjects of math, science, Arabic and English by 3% in grades 3 and 6 and 6% in grades 9 and 12.</p>	Provide all students with equitable access to high-quality compulsory education regardless of sex, age and abilities.	MEHE	QF
Primary to secondary education (6): Improve student outcomes at a rate that suits each stage of basic education to ensure a successful transition to post-secondary education.	<p>6.1 By Target: By 2022, increase the performance rate of students who achieve 70% or higher in the basic subjects of math, science, Arabic and English by 3% in grades 3 and 6 and 6% in grades 9 and 12.</p>	Improve student outcomes in basic subjects (math and language skills in Arabic and English) and practical knowledge and develop the 21st century competencies at all education levels	MEHE	QF QU
Primary to secondary education (7): Improve learners' 21st century competencies necessary for life and employability.	<p>7.1 Increase the average score of students from Qatar in the international tests that include Progress in International Reading Literacy Study (PIRLS), TIMSS and Programme for International Student Assessment (PISA) at a minimum rate of 30 points per round.</p> <p>7.2 Reduce grades 1-12 average absenteeism rates by 5% (1% per annum).</p>	Improve student outcomes in basic subjects (math and language skills in Arabic and English) and practical knowledge and develop the 21st century competencies at all education levels.	MEHE	QF QU
Primary to secondary education (8): Increase all grades 1-12 learners' awareness and pride of Qatar's values and heritage, while promoting tolerance, understanding and respect for other cultures and people.	8.1 Develop tools to measure students' understanding of Qatari and global citizenship, assess how well they apply positive values, and start implementation by 2019.	Develop the concept of Qatari and global citizenship and promote active and positive participation in society.	MEHE	MOCS

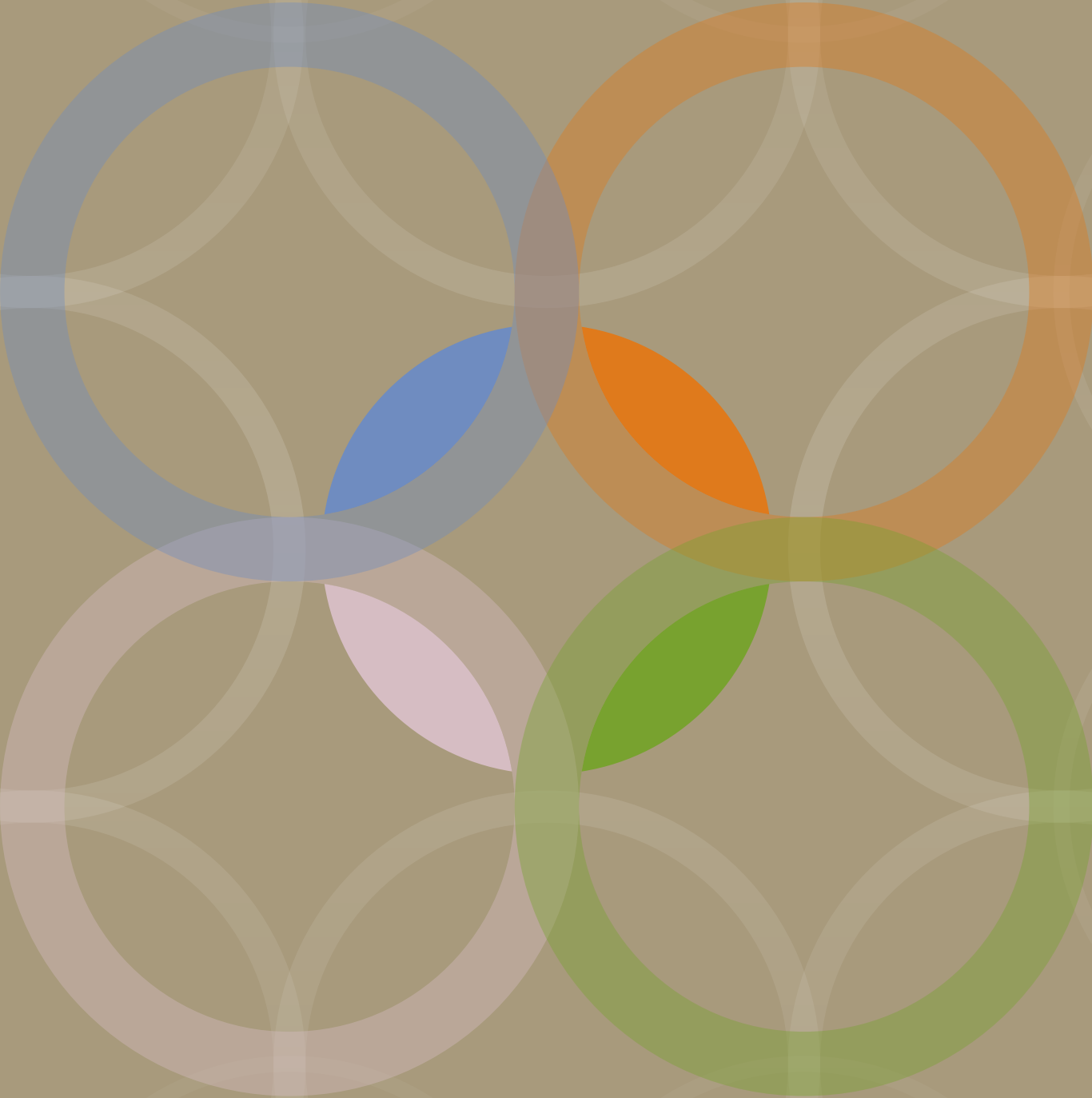
Intermediate outcomes	Specific Targets	Programmes/ Projects	Implementing agencies	Supporting agencies
<p>Primary to secondary education (9): Improve the quality and performance of primary to secondary education staff.</p>	<p>9.1 Increase the percentage of teachers with appropriate and recognized teaching qualifications (diploma or Bachelor of Education) in public schools by 10% (2% per annum).</p> <p>9.2 Increase the number of teachers with professional licenses in public schools by 30% (6% per annum).</p>	<p>Improve the quality and performance of primary to secondary education staff in public and private schools.</p>	<p>MEHE</p>	<p>QF QU</p>
<p>Post-secondary education (10): Provide all learners with equitable access to high-quality post-secondary education and training programmes regardless of sex, age and abilities.</p>	<p>10.1 Increase the rate of Qataris' enrollment in post-secondary education by 5% among females and 10% among males by 2022.</p>	<p>Enhance access to quality higher education programmes, lifelong learning and continuous professional development</p>	<p>MEHE</p>	<p>QF QU</p>
<p>Post-secondary education (11): Improve student outcomes and graduation rates in tertiary and postgraduate programmes as well as in post-secondary TVET programmes.</p>	<p>11.1 Increase the graduation rate among male and female Qatari post-secondary students by 10% by 2022.</p> <p>11.2 Raise the graduation rates among male and female Qatari students in knowledge economy disciplines (math, science, IT and engineering) by 10% by 2022</p>	<p>Develop a national framework for graduates' competencies to ensure improved student outcomes in all post-secondary education programmes of higher education and TVET programmes.</p>	<p>MEHE</p>	<p>All higher education institutions.</p>
<p>Post-secondary education (12): Increase all post-secondary learners' awareness and pride of Qatar's values and heritage, while promoting tolerance, understanding and respect for other cultures and people.</p>	<p>12.1 Develop tools to measure students' understanding of Qatari and global citizenship, assess how well they apply positive values, and start implementation by 2019.</p>	<p>Improve student outcomes in higher education and TVET programmes.</p>	<p>MEHE</p>	<p>All higher education institutions</p>

Intermediate outcomes	Specific Targets	Programmes/ Projects	Implementing agencies	Supporting agencies
Post-secondary education (13): Improve the quality and performance of post-secondary education and training staff.	13.1 Increase the proportion of Qatari faculty staff in post-secondary education institutions to 13%, by 2022 (2.2% per annum).	Improve the quality, performance and readiness of graduate professionals or staff.	MEHE	All higher education institutions
Governance (14): Improve governance, planning, policy development, decision-making and accountability procedures in the ETS.	14.1 Develop a system and a comprehensive mechanism for ETSS governance and start implementation by 2018.	Build a comprehensive national data system for the ETS that includes labor market data to support decision-making at all levels.	MEHE	QU QF QNCECS
Governance (15): A clear and more effective and efficient mechanism for spending and resource allocation in the ETS.	15.1 Develop a framework to improve efficiency of the ETS spending by examining the current mechanisms of budget/resources allocation, and propose solutions and start to apply them by 2019.	Develop a plan to improve spending efficiency in the ETS by reviewing the policies and regulations currently in place for resource allocation and education spending.	MEHE	QU QF QNCECS

Part IV: Promoting Human Development



Chapter III: An Efficient and Committed Workforce



1. Introduction

The QNV 2030 constitutes the general framework for Qatar's transition towards a diversified and competitive knowledge economy that ensures private sector participation. A knowledge-based economy primarily depends on the use of ideas rather than physical capabilities and on the application of technology rather than processing raw materials or employing unskilled labor force. To achieve this transition, it is necessary to build an efficient and highly motivated and engaged national workforce. Given the small size of Qatar's population, citizens will not have the numbers and skills enough to manage complex systems, infrastructure and other work requirements under the Fourth Industrial Revolution, rapid growth, and diversified and technologically advanced economy. The goal of transforming Qatar into a diversified knowledge economy and increasing private sector participation in national development depends on continuing to build the Qataris' capacities, taking advantage of highly educated Qatari women, directing the labour market towards the recruitment of skilled and globally competitive expatriate workers, developing labour legislation, and improving the labour market information system).

2. Progress toward the outcomes and targets of the labour market sector (2011-2016)

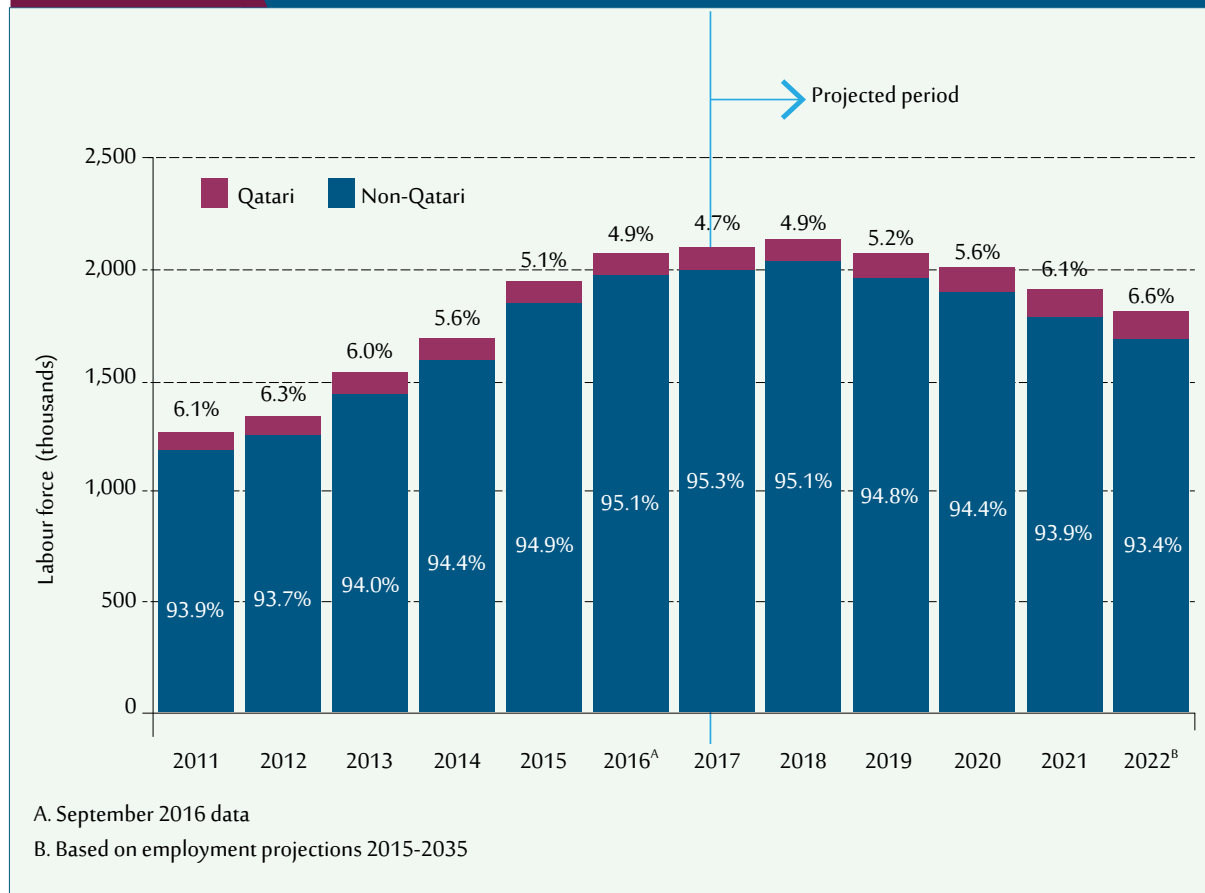
Qatar has achieved good male and female labor market participation rates (69% and 36% respectively in 2015). While the male participation rate is less than that of the MENA region (75%), the female participation rate is much higher than that of the MENA region (22%).⁷¹ Most Qataris (90%) work in the public sector (both government departments and government companies). The proportion of Qataris in the private sector has also increased from 7% to 12%⁷² of the total Qatari workforce.

In an effort to address the major challenges as expressed by the QNV 2030, particularly those relating to the type and size of residents and Qataris working in the private sector, the government, during the NDS-1, implemented a number of projects under the Labour Market Sector Strategy whose implementation was assigned to leading government entities. In respect to motivating Qataris to work in the private sector, the NDS-1 sought to increase the benefit package for Qataris working in the private sector to make it more attractive, such as expanding the retirement coverage to include some private sector enterprises. Emphasis was also placed on the expansion of high-quality training programmes for Qataris. Most of the trainings held for civil servants were under the Linking Career to Training Programme – implemented by ADLSA – with no clear plan to improve the skills of private sector workers. Progress was modest in improving labour productivity, enhancing workforce quality and building skills. The demographic rebalancing of Qataris and foreigners remained a challenge that could only be addressed through concerted efforts to ensure the highest quality and productivity of the workers needed to implement the 2022 FIFA World Cup projects. In 2015, 19.6% of expatriate workers were concentrated in unskilled occupations, while 51.4% were in semi-skilled occupations. Only nearly 29% worked in jobs requiring high or very high skills.⁷³ The influx of expatriate workers is expected to continue until the infrastructure projects related to the 2022 FIFA World Cup are completed in 2018 when the population will reach 2.7 million and then start gradually decreasing owing to the decline in expatriate labour force following the end of most major State infrastructure projects. The share of citizens in the labour force will however remain as low as 6% during that period (Figure 4.3.1).

71 WB website, World Development Indicators, 2014.

72 MDPS, Qatar Statistics Authority Workforce Survey, 2008 and 2015, and the International Labour Organization's new database, 2016.

73 MDPS, Labour Force Survey 2015.

Figure (4.3.1): Projected and actual share of Qataris in the workforce, 2011-2022

Source: Labour force surveys 2008-2016 and the 2010 Census by Qatar Statistics Authority (QSA).

3. Challenges facing an efficient and committed workforce (2018-2022)

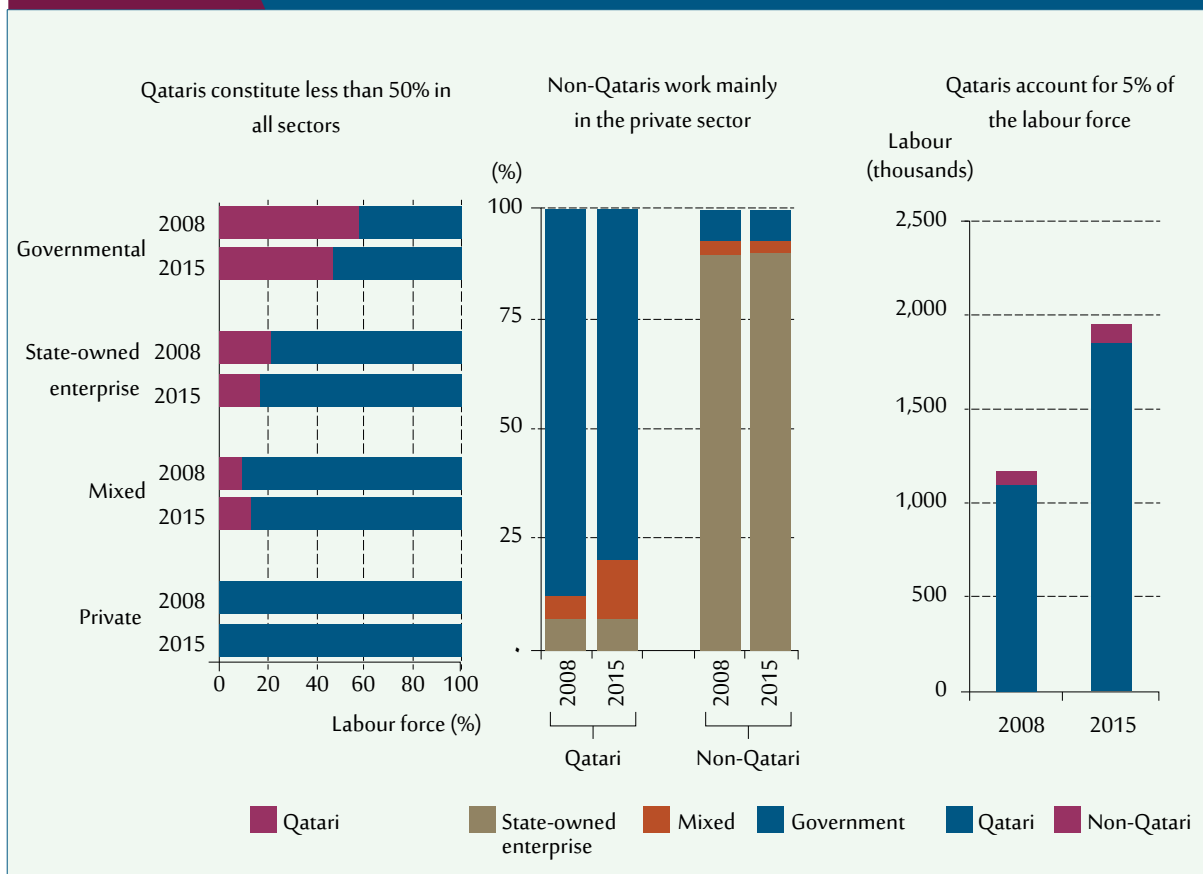
Despite the achievements made under the NDS-1, the Labour Market Sector Strategy 2017-2022 identifies some challenges facing the sector and seeks to overcome them through the development of necessary policies and initiatives. Focus will be on re-balancing the labour market structure; increasing work efficiency in different sectors; developing the capacities of Qataris, especially highly-educated women; attracting and retaining skilled and highly experienced workers; developing labour legislation; and improving the labour market information system. Major challenges are dealt with below.

Re-balancing the labour market structure

Qatar's labour market has strong multi-faceted dichotomies between the public and private sectors, between citizens and expatriate workers, between highly skilled and low-skilled workers, and between Qatari males and females. Qataris work mostly (90%) in government jobs, and migrant workers work mostly (95%) in the private sector with limited labor mobility between the two sectors.⁷⁴ Qataris still constitute less than half of civil servants, although the civil service is still more attractive to citizens due to job stability, relatively high wages and in-kind benefits. The salary gap between the two sectors and between Qataris and non-Qataris is yet another dichotomy. The existence of these two sectors and their different characteristics have limited the labour market effectiveness. Another imbalance is the distribution of expatriate labour among different occupations.

74 MDPS, Labour Force Survey, 2015

Figure (4.3.2): Workforce characteristics and structure



Source: MDPS, Labour Force Surveys, and 2010 Census.

Employment policies

Qatar has a very low unemployment rate among young people aged 15-24 years (2.4%⁷⁵ in 2016) compared to the rest of the world (13.1%⁷⁶ in 2015). However, designing and implementing employment policies to improve the labor performance in the public and private sectors and encourage competition between them remains a major challenge in light of the limited number of Qataris and the growing need for them in the public sector. Moreover, the significant differences between working conditions and requirements in comparable jobs in the public and private sectors in terms of working hours are also an additional challenge that has serious implications for the labour market behaviour and this reduces the attractiveness of the private sector to Qatari workers or jobseekers. Linking wages to productivity in the public sector can have positive effects as differences in wages and productivity will be significantly narrowed between public and private sector labor on the one hand, and between Qataris and non-Qataris, on the other. It will also make the workforce more productive and efficient.

Plurality of labour market stakeholders and intersectoral linkages

The fact that there are many labour market stakeholders (MADLSA, MEHE and MOI) is a challenge to the implementation of NDS-2 projects and programmes. Although MADLSA oversees the aspects of both Qatari and expatriate labor force, other public and private agencies are also concerned with labour market policies, and therefore cooperation is necessary and possible. MOI, for example, issues entry and exit visas for expatriate workers and manages their employment contracts.

75 MDPS, Labour Force Survey, 2016

76 http://www.ilo.org/global/about-the-ilo/newsroom/news/WCMS_412014/lang-en/index.htm

MEHE develops educational plans, policies, strategies and research. It also trains and develops all its employees to implement an integrated system of educational services in order to achieve the QNV 2030.

Given the importance of labor market issues, there should be discussions with public opinion leaders, including religious scholars, teachers, representatives of civil society and private sector and academics. Discussions should focus on demographic imbalance and risk, and the importance of education, training and lifelong learning in order to have an efficient and committed workforce. Given the many cross-sector relationships among the sectors involved in the labor market, the successful implementation of an efficient workforce sector strategy would not only lead to human capital development and more efficient labor market, but also to realizing other QNV 2030 goals as a result of the many inter-sectoral relations. Higher education levels have direct impacts on labor force participation. Furthermore, an interrelationship among education, training and employment requires that sectoral policies and decisions be coordinated, coherent and integrated in the context of appropriate institutional arrangements.

4. Main outcome, intermediate outcomes and specific targets in an efficient and committed workforce sector (2018-2022)

Main outcome

“A competitive labour market that enables Qatar’s population to participate in development, build a prosperous society and meet the needs of the current generation without compromising those of future generations through effective participation of Qataris in the labour market, high labour productivity comparable to those in OECD countries, highly skilled labour capable of competing in the global market, and a modern and transparent information system that provides data on both the supply and demand sides of recruitment and training.” To achieve this main Outcome, the following intermediate outcomes have been identified:

Intermediate outcome 1: A labour market that encourages investment in human capital development.

The QNV 2030 aspires to a greater economic role of Qataris by increasing their participation in the workforce, especially in high-level professional and technical jobs. Increasing Qataris’ technical skills, in particular those in line with the labor market needs, will lead to a better and more active workforce participation. MADLSA has made considerable efforts through ongoing training courses, linking the training track with the career path and the Government Scholarship Plan 2015-2021 to address the challenge of meeting the public sector needs for highly skilled citizens. Meeting the public sector’s technical training needs remains poor. Also, these courses do not sufficiently respond to the private sector’s needs. Qatari males’ labor force participation rate increased to 69% in 2015, whereas females’ labor force participation rates remained steady, with a significant and continuous decline among the more educated women exceeding 34% over the period 2008-2015 (Table 4.3.1). Social and cultural factors are important for making women’s decisions to enter the labour market, especially family and husband consultation,⁷⁷ in addition to a desire to raise children and start a family.

77 MDPS, Labour Market Sector Strategy, MTR, 2014, p.28.

Table 4.3.1: Qataris' labour force participation rates (%) by sex and educational level (age group 20-59 years)

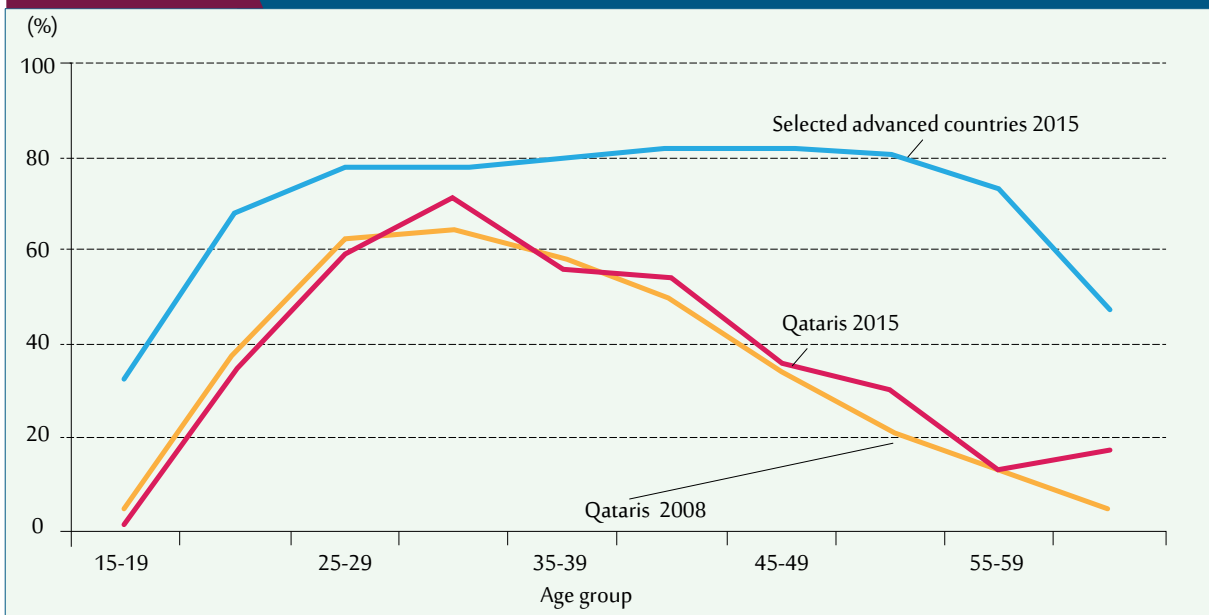
Year	Primary school	Secondary school	Tertiary	* All levels
Males				
2008	71	79	91	63
2010	70	81	90	66
2012	52	85	87	68
2014	60	87	92	69
2015	70	86	91	69
Females				
2008	9	34	91	36
2010	10	39	72	36
2012	8	39	69	35
2014	7	40	61	35
2015	10	45	57	36

* All levels refer to labor force aged 15+

The patterns of Qataris' labour force participation rates by age did not change significantly between 2008 and 2015. The salient feature of Qatari women is the relative stability of their participation rates over time and their rise after the age of 30 years. However, these rates are significantly lower than in selected more advanced countries⁷⁸ (Figure 4.3.3).

Figure (4.3.3):

Qatari women' labor force participation rate compared with selected developed countries (2008 and 2015)



Source: MDPS, Labor Force Sample Survey; ILO's new database, 2016; and QSA Labor Force Sample Survey 2008.

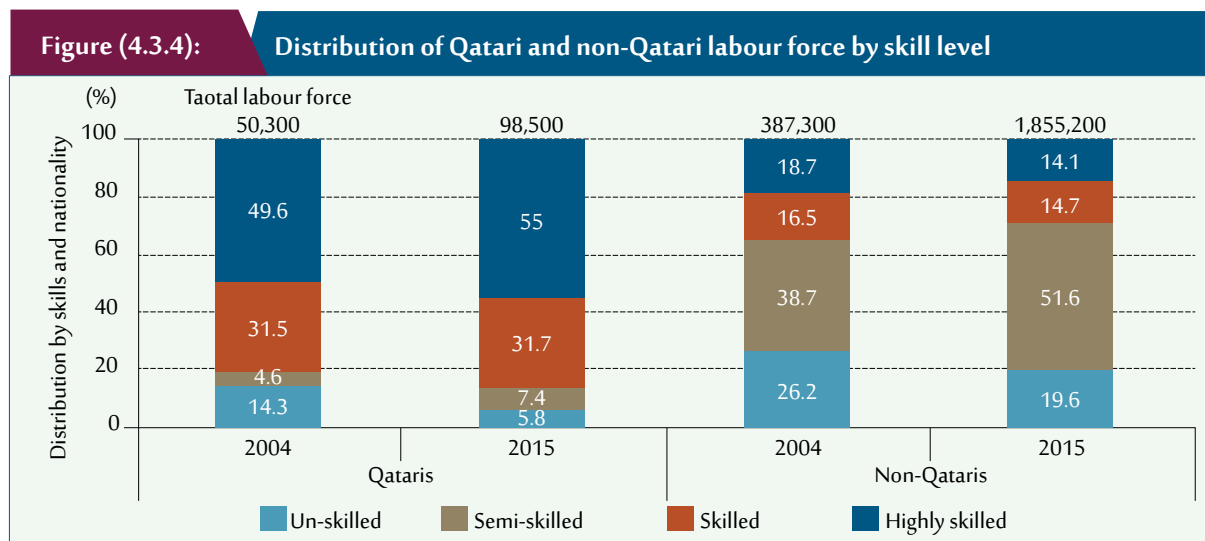
78 Denmark, France, Germany, Japan, Norway, UK, USA and New Zealand.

To achieve this outcome, the government will improve work efficiency in the public and private sectors, support the rebalancing of the labor market structure through a strategic human resources plan, develop the national labor force capacity efficiently and effectively in line with the requirements of government agencies, develop programmes to encourage youth scholarships, promote entrepreneurship among Qatari youth, create opportunities for jobseekers, provide opportunities for citizens' participation in development, identify new roles for foreign employment and expertise, replace expatriates with national skills in supervisory and leadership positions, promote a culture of citizenship as a responsibility and promote its role in development, strengthen professional ethics and adherence to professional standards, promote a culture of initiative and productivity at work, and build national leadership, especially the middle leadership. The government will also strengthen partnership with the private sector and enable nationals to assume leadership positions therein given the globally growing importance of high skills in managing complex systems and sophisticated infrastructures, such as smart cities, airports and railways.

- **Target 1:** Train and develop national human resources by 2022.
- **Target 2:** Increase the number of science, math, technology and engineering graduates in government scholarship programmes by at least 50% by 2022.
- **Target 3:** Improve human resources policies by 2022.

Intermediate outcome 2: A labour market that provides skilled and highly productive expatriate labour.

A shift towards a knowledge-based economy with high skills that pays high wages on the basis of productivity is a challenge as the limited hydrocarbon resources that contribute to growth need to be replaced on the medium and long run with a growth driven by knowledge and skills and led by an independent and innovative private sector. Breaking down labour force by nationality and skill⁷⁹ shows that Qataris are concentrated in skilled and highly skilled jobs (87% in 2015 compared to 81% in 2004), while expatriate workers are mainly concentrated in semi-skilled and unskilled jobs (71% in 2015 compared to 64% in 2004). The NDS-2 seeks to increase the share of highly skilled expatriate workers out of all foreign workers in the country (Figure 4.3.4).



Source: MDPS, Labour Force Sample Surveys, various years; and QSA, General Population, Housing and Establishments Census, 2010.

⁷⁹ High-skilled in posts 1-3, skilled in posts 4-6, limited skills in posts 7-8, unskilled in posts 9, 1 = legislators, senior officials and managers; 2 = specialists; 3 = technicians and specialists' assistants; 4 = clerks; 5 = workers in service occupations and in sales in markets and shops; 6 = workers in agriculture and fishing; 7 = craftsmen and associated professions; 8 = operators of factories and machines and assembly workers; and 9 = workers in primary occupations.

Productivity is the main engine of growth in the global economy. Raising productivity is therefore a fundamental challenge for countries going forward⁸⁰. The current levels of labour force productivity in Qatar appear to be comparable to benchmark countries⁸¹ in knowledge-intensive sectors, but lower compared to labour-intensive sectors. Employers, to the fullest extent, have exploited the open migration policy that has secured an inexhaustible source of unskilled or semi-skilled labour at (very low) global wages. This situation has undermined incentives for investment in capital equipment and the use of more highly-skilled labour which could reduce overall labour demand. Without reducing the supply of low-cost and low-skilled labour and increasing the attractiveness of capital investment and the highly-skilled labour force, sound economic diversification and reduced proportion of expatriate workers are unattainable. Despite the positive GDP growth and the remarkable growth in capital stock, the total factor productivity was negative, ranging from -4.9% to -4.2% between 2011 and 2015, which means that resources can be better exploited to achieve the goals and targets of both the QNV 2030 and the NDS (Figure 4.3.5).⁸²



Source: MDPS, Environmental and Economic Development Planning Department, 2017

To achieve this outcome, the government will examine the development of a comprehensive recruitment policy and allow highly-skilled expatriate workers in the private sector, particularly in labour-intensive sectors such as construction, whose employment contracts have expired or who have been dismissed, to be moved to other sectors or re-employed after regularization in other suitable and vacant positions as an alternative to recruitment. Strategies should be developed to mitigate the risks of heavy dependence on unskilled expatriate labour. Literature shows that the expatriate workers who remain permanently in the host country tend to invest more in human capital, which supports the QNV 2030 goals⁸³ and this can be achieved through a programme to recruit and retain highly skilled expatriate workers as needed. The programme will include strategies to mitigate the risks of heavy dependence on unskilled expatriate labor. A cross-sector coordination commission may liaise between expatriate workers and public and private institutions, and examine the causes of instability for skilled expatriate workers.

80 <https://www.oecd.org/eco/growth/OECD-2015-The-future-of-productivity-book.pdf>, p 3.

81 Benchmark countries: Norway, Singapore, 2015.

82 MDPS, Environmental and Economic Development Planning Department, 2017

83 World Bank, Thematic Report: Population, Labour and Sustainable Development, (2017) p. 23.

The government will also work to reduce the gap between the cost of capital and low-skilled labour to encourage employers to invest in capital productivity rather than favoring low-cost employment. It will also make the private sector more attractive by reducing the gap of salaries, compensation packages, incentives and working hours between the public and private sectors; encouraging greater employer interest in investing in capital equipment or in using skilled labour to shift from comparative advantage in oil and gas towards a competitive advantage in human capital that is a crucial element for a transition towards a knowledge economy; supporting Qataris' high-skill levels and increased participation in the labour force by raising the cost of expatriate workers recruitment and reconciling the employment regulations and policies of the public and private sectors; increasing the attractiveness of employing highly skilled workers by employers, by making them bear all the fees of recruiting low-skilled workers, currently assumed by the government; and supporting efforts to improve access to funding for projects with high capital through subsidies or soft loans.

■ **Target 1:** Increase the proportion of highly skilled expatriate workers in the labour force to at least 20% by 2022.

■ **Target 2:** Increase total productivity by at least four points by 2022.

Intermediate outcome 3: A labour market governance that ensures meeting current and future needs for reliable data.

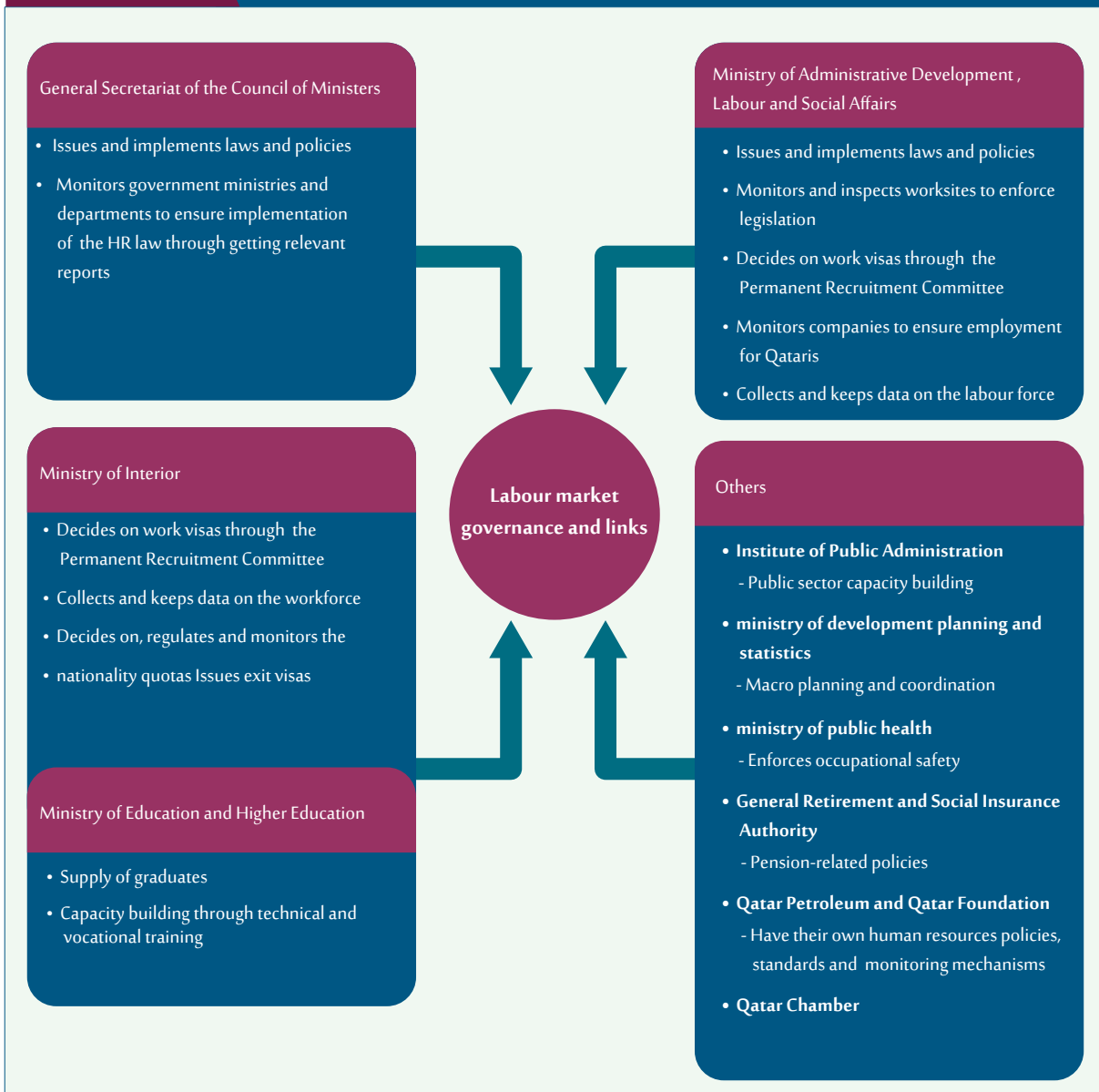
Based on an NDS-1 proposal to review and revise the sponsorship system in Qatar, the government promulgated Law No. 21 of 2015 which regulates the entry, exit and residence of expatriate workers, and is expected to open the way to greater competition through ensuring flexible labor mobility in the labour market and giving an opportunity for talents, which increases the labour market efficiency and facilitates intersectoral labour mobility. The government has also adopted and applied the Wage Protection System to ensure timely payment of wages and reduce relevant labour complaints. The QF launched a Migrant Workers Welfare Initiative in 2010 through the establishment of a framework of mandatory standards to protect workers and promote ethical practices in construction projects. In early 2014, the Supreme Committee for Delivery and Legacy that oversees Qatar's plans to host the 2022 FIFA World Cup launched the Workers' Welfare Standards, that includes wage payment, housing, occupational health and safety, and periodic monitoring to ensure compliance with these standards.⁸⁴ Supporting the labour market restructuring processes requires follow-up and support for development efforts in the area of labour market legislation.

The labour market data and related research are essential for evidence-based policymaking. However, a lack of comprehensive labour market studies and data limits Qatar's ability to develop an effective labour market policy. There is no single source for labour market data, so it is difficult for stakeholders to access them. The main source of labour market data on those subject to Labour Law is MADLSA, while MOI is the main source of data on those who are not subject to it, including domestic workers, nannies, cooks, drivers and gardeners, which are major categories of foreign labor⁸⁵. These databases need to be better assembled in a major interactive labor market database to coordinate among key stakeholders, such as MADLSA, MOI, MDPS, MoPH, MEHE, Qatar Petroleum (QP), QF, Qatar Chamber (QC), and the General Retirement and Social Insurance Authority (Figure 4.3.6).

⁸⁴ MDPS; 4th HDR of the State of Qatar, (2015), p. 45.

⁸⁵ MDPS, MDPS, UN Development Program, 4th HDR of the State of Qatar, (2015), p.46

Figure (4.3.6): Labour market linkages and governance



Source: MDPS, Environmental and Economic Development Planning Department, 2017

To achieve this outcome, the government will build on the databases of various State bodies, such as MOI, MADLSA, MDPS and QP; link them all in order to provide necessary, quality and timely data and indicators on the current and future trends of the labour market supply and demand; support them by increasing data sources such as follow-up studies on graduates; complete and activate the labour market information system to make it easy to use by policy makers and responsive to the data needs of various stakeholders; develop a methodology for information sharing; provide guidelines to ensure the security and privacy of individual records; and facilitate research on the factors affecting the labour market. The government will also develop and improve labour market legislation and policies, improve labour market information and enhance its use processes, develop mechanisms to control contingency spending and turn it into an opportunity to tackle disadvantages and ensure efficient government spending.

■ **Target:** Create a reliable labour market database capable of providing the required data in a timely fashion by 2022.

5. Conclusion

The national workforce development strategy will work to achieve the main outcome:

“A competitive labour market that enables Qatar’s population to participate in development, build a prosperous society and meet the needs of the current generation without compromising those of future generations through effective participation in the labor force, achieving high productivity, attracting and maintaining highly skilled labour, and a modern and transparent information system that provides data on both the supply and demand sides of recruitment and training.”

This main outcome is served by three intermediate outcomes: A labour market that encourages investment in human capital development; a labour market that provides skilled expatriate labour and high labour productivity; and a labour market governance that ensures meeting current and future needs for reliable data.

At the same time, mention should be made of the operational challenges of the multiplicity of labour market stakeholders. While MADLSA oversees the aspects of Qatari and expatriate labour force alike, other actors are concerned with labour market policies and, therefore, cooperation is necessary. Consultations should also be held with public opinion leaders of religious scholars, teachers, representatives of civil society and private sector, and academics on labor market issues, such as the demographic imbalance and risk, and the importance of education, training and continuous learning in order to have an efficient workforce and to ensure the participation of all stakeholders, taking advantage of success stories in the country.

The interdependence of the labour market sectors also has strong impact on the successful implementation of the Labor Market Strategy, the benefits of which are not only human capital development but also the achievement of other QNV 2030 goals. Higher education levels have direct impact on labor force participation. A greater familiarity with the benefits of education, training and knowledge would encourage Qataris to stay longer in school and improve their educational performance. Furthermore, interrelation among education, training and employment requires that sectoral policies and decisions be coordinated, coherent and integrated in the context of appropriate institutional arrangements.

To achieve the national labour market outcomes, the government will continue to carry out a substantial development process over 2018-2022 to promote human capital development that serves sustainable economic growth and enables transition to a knowledge-based economy. The government also seeks to increase labour market efficiency by striking a balance between the supply and demand for labour in the public and private sectors.

6. Annex

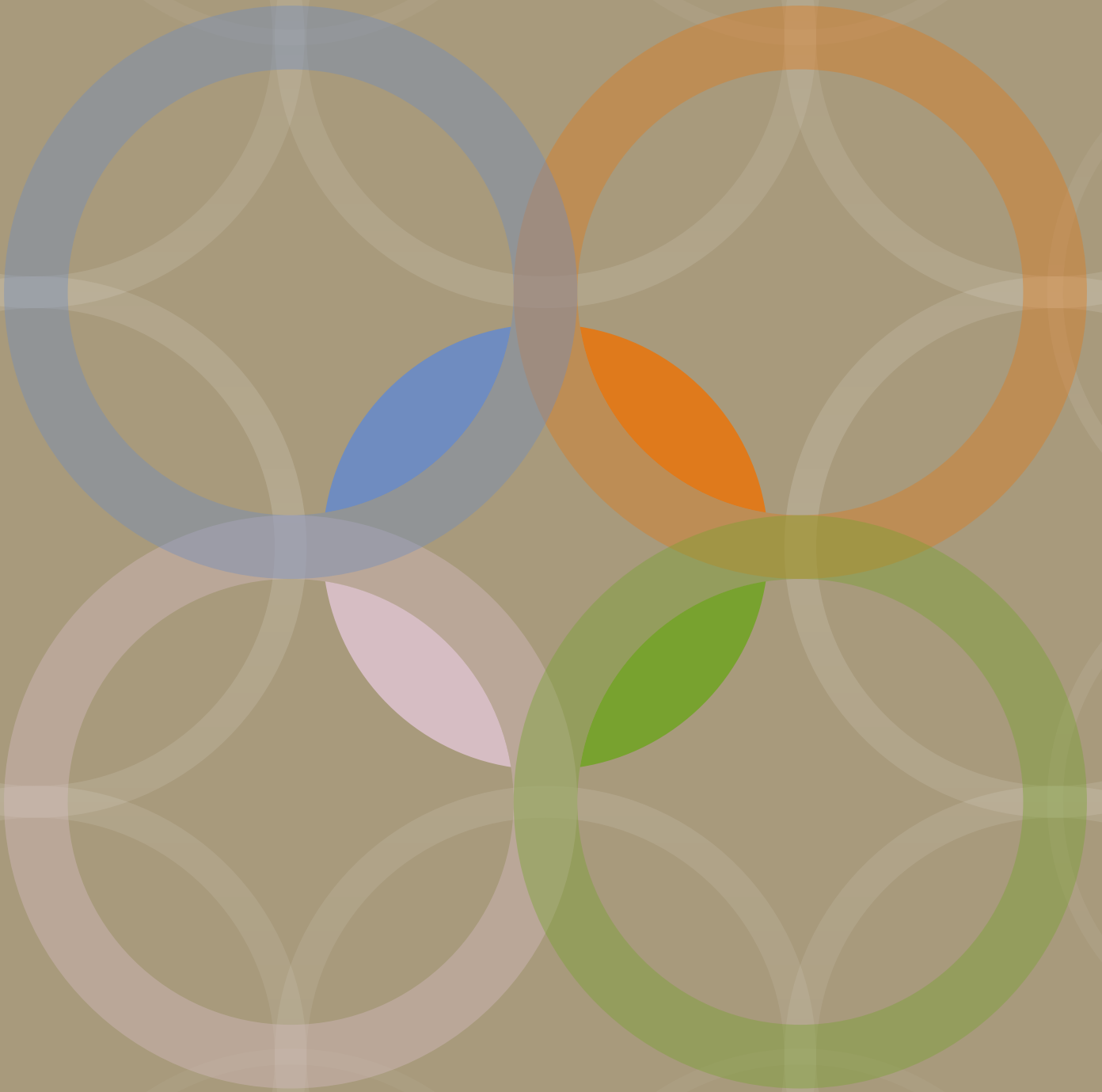
Main outcome, intermediate outcomes, targets, projects, and implementing agencies that contribute to the main outcome “A competitive labour market that enables Qatar’s population to participate in development, build a prosperous society and meet the needs of the current generation without compromising those of future generations through effective participation in the labour force, achieving high productivity, attracting and maintaining highly skilled labour, and a modern and transparent information system that provides data on both the supply and demand sides of recruitment and training.”

Intermediate outcomes	Specific Targets	Programmes/Projects	Implementing agencies	Supporting agencies
Intermediate outcome 1: A labour market that encourages investment in human capital development	<p>1.1. Train and develop national human resources 2022.</p> <p>1.2. Increase the number of science, math, technology and engineering graduates in government scholarship programmes by at least 50% by 2022.</p> <p>1.3. Improve human resource policies by 2022</p>	Strategic Plan for Human Resource Development	MADLSA	MEHE QP QU
Intermediate outcome 2: A labour market that provides skilled and highly productive expatriate labour	<p>2.1. Increase the proportion of highly skilled expatriate workers in the labour force by at least 20% by 2022.</p> <p>2.2. Increase total productivity by at least four points by 2022.</p>	High-skill Expatriate Worker Attraction Labour Market Productivity Upgrading	MADLSA MADLSA	MEC MOI QC MEC MDPS
Intermediate outcome 3: A labour market governance that ensures meeting current and future needs for reliable data	3.1 Create a reliable labour market database capable of providing the required data in a timely fashion by 2022.	Labour market information system and the provision of capacity to use it	MADLSA	MOI QP MEC MDPS MOPH MEHE

Part V: Sound Social Development



Chapter I: Social Protection



1. Introduction

Qatar looks forward to the building of “An effective social protection system for all Qataris that ensures their civil rights, values their contribution in developing their society, and ensures an adequate income to maintain a healthy and dignified life.”

In line with the QNV 2030, the country’s leadership has instructed that one of the Second National Development Strategy 2018-2022 (NDS-2) themes should be:

“transition from the reactive state of simple social welfare policies to a proactive state by enabling all social segments to participate in national development.”

From His Highness the Emir’s speech on the themes of the NDS-2 at the Shura Council, November 1, 2016

The Social Protection Strategy (SPS), a sector of the NDS-2 (2018-2022), features prominently in the development priorities of the political leadership which supports the establishment of a cohesive, just and inclusive society for all. Many key government agencies are working towards its realization. The SPS is a rights-based and people-centered plan that is hoped to be inclusive and conducive to transformation. It is based on the guidance of the country’s higher leadership, QNV 2030 aspirations, and the lessons learned from the NDS-1 (2011-2016). It is inspired by the principles and goals of the UN 2030 Agenda for Sustainable Development (2015-2030).

Guided by the QNV 2030 goals and the directive of the higher leadership, and consistent with the 2030 Sustainable Development Goals (SDGs); the SPS 2017-2022 will work to achieve the necessary social development requirements and conditions. These will be achieved through the implementation of strategic policies, programmes and mechanisms that enhance social protection for all citizens, empower different social groups, provide them with the necessary skills and voice to ensure freedom from need and fear, guarantee their right to a healthy, dignified and secure life, while preserving the social and cultural values. Social protection is an essential component of an integrated approach for sound social development aimed at preserving the well-being of Qatar and its citizens, and a safe, secure and stable society free from all social risks and ills that might threaten its integrity. The SPS framework is based on three pillars: social welfare, social capital, and Qatari family. Based on these pillars, the stakeholders’ representatives have unanimously identified the sectoral strategic outcome priorities as follows:

1. An integrated, effective and sustainable social welfare system;
2. A strong, cohesive and empowered Qatari family; and
3. An increased scope and effectiveness of social capital.

This Chapter addresses the achievements of the SPS (2011-2016) during the NDS-1 period, as well as the sector challenges, main outcomes and targets of the NDS-2 (2018-2022).

2. Progress towards the outcomes and targets of the social sector strategy in NDS1 (2011-2016)

Social development formed one of the NDS-1 pillars that sought to translate the QNV 2030 goal of promoting and developing the social structure through integrated social policies and programmes comprised of five sectoral strategies: Family Cohesion And Women's Empowerment, Social Protection, Security and Public Safety, Culture and Sport. The NDS-1 was committed to building a social protection system to ensure a dignified social life for citizens and recognize their community contributions. Through this system, the NDS-1 aimed at achieving the following three broad outcomes through 10 projects:

1. An integrated social protection system;
2. An enabling environment for the integration of marginalized and vulnerable groups into society and work force; and
3. broaden participation base through smart partnerships.

Follow-up reports on the implementation of social protection projects show that progress, albeit noticeable, was uneven.

For instance, **for the first sectoral outcome**, the real household income has more than doubled and the number of Qatari families participating in the Productive Family Programme increased from 220 in 2008 to 587 in 2012. Income differences among Qatari households narrowed over time and Gini coefficient was 0.273 in 2012-2013 down from 0.293 in 2006-2007. (The Gini coefficient measures the income variation of a nation's residents: the value zero expresses perfect equality, while the value 1 expresses inequality). The relative income-poverty rate remained largely unchanged over time, but the proportion of children living in low-income households increased from 13.4% to 15.2% during 2007-2013.⁸⁶

Public spending on social benefits rose from 0.05% of GDP in 2008 to 0.14% in 2015. The Ministry of Administrative Development, labor and Social Affairs (MADLSA) data suggest that social security benefits increased by 200% in 2014 compared with 2013 and a doubled number of beneficiaries between 2007 and 2015. In the area of family cohesion, updated statistics indicate that the number of divorce cases among Qataris dropped from 19 to 16 per 1,000 married persons over 2008-2015. This contributes positively to the cohesion of Qatari families. The MTR report also points to the destabilization of family cohesion due to behavioral changes resulting from accelerated social and economic changes, such as a delayed age of marriage (and consequently a high child-bearing age), and low fertility, which threatened family cohesion.

Concerning **the second sectoral outcome**, Qatar made significant strides towards promoting the rights of marginalized and vulnerable groups and their integration into society and workforce, particularly in employment and education.⁸⁷ The number of families participating in the Productive Family Programme surpassed the NDS's target, rising from 200 in 2008 to 587 in 2012 (nearly 200% annually). A relative progress was made towards providing persons with disabilities (PWDs) with support and means to enable them to exercise their rights, particularly in education and employment. Their levels of education and employment however remain lower than those of general population. Better results can be achieved if the current law is applied, which stipulates that PWD employment rate should not be less than 2%.⁸⁸

⁸⁶ NDS 2011-2016, MTR, MDPS, 2014.

⁸⁷ Qatar's 4th Human Development Report, MDPS, 2015.

⁸⁸ Qatar's 4th Human Development Report, 2015, *ibid.*

Regarding **the third sectoral outcome** which sought to broaden participation base through smart partnerships, essential steps were made to build a partnership framework. These included conducting a survey on corporate social responsibility, organizing a number of conferences on social protection, and identifying the key indicators to measure corporate social responsibility. The NDS-1 period saw a growing role of civil society organizations (CSOs) in various aspects of social action through distinctive efforts. These CSOs include the Qatar Foundation for Education, Science and Community Development (QF); the Qatar Foundation for Social Work (QFSW), and many charities that support social protection in Qatar. In view of the increasing challenges facing the traditional values of family cohesion as a result of rapid economic and social changes and the possible weakening of the solidarity role of Qatari families, it has become necessary to continue to broaden the partnership base among the government, CSOs and the private sector in order to strengthen social protection.

3. Challenges facing social protection sector (2018-2022)

SPS 2017-2022: Continuity of development priorities under emerging and existing challenges

Qatar is currently undergoing a new development phase towards realizing the QNV 2030 goals. The country is facing new economic and social changes, significantly different from those when the NDS-1 was developed in 2010 and launched in March 2011. These developments have resulted in new challenges that require prudent economic and social measures and policies to ensure sustainable development. The most significant change is the slowdown in economic growth owing to declined oil revenues, which required the re-prioritization of public spending.⁸⁹ Another significant change is the high population growth over the past six years as a result of the large government infrastructure projects that have led to a continuing flow of foreign labour and have had implications for the society, the environment, the services and the labour market.⁹⁰

These changes are likely to limit the financial and human resources available to implement the ambitious programmes of the Social Protection Sector. However, the sector priorities will remain as they were in the NDS-1 owing to the large number of emerging projects and ongoing programmes that Qatar needs to complete to establish an integrated social protection system, build an enabling environment for the integration of marginalized and vulnerable groups into society and work force, and broaden community participation to sustain social protection.

In addition to the challenges arising from internal and external changes as noted above, and according to the NDS-1 Mid-term review report, a number of operational constraints inhibited the desired progress in implementing some of the NDS-1 Social Protection Sector Strategy projects. These constraints can be summed up as: a lack of priorities in the implementation of SPS projects; poor governance, management and human resources; weak internal and cross-sectoral coordination in project implementation; and inadequate databases to monitor progress. The lessons learned from the NDS-1 implementation will greatly help develop the necessary measures to address shortcomings and challenges and ensure efficient implementation of the NDS-2 social protection programmes and projects.

This section of this chapter examines the challenges facing the Social Protection Sector through highlighting the current situation of the three pillars of the SPS sector: social welfare, Qatari family and social capital.

Challenges facing social welfare

Social welfare is a major input in the process of social, economic and human development and it is also a source of social

⁸⁹ Issue 18, Overview of Economic Statistics in Qatar, MDPS, February 2017.

⁹⁰ See Sustainable Development Indicators in Qatar, MDPS, 2015.

change and improvement of living standards. With the trend of building modern states, the traditional concept of social welfare has changed from the simple provision of aid services to a paradigm that nurtures human beings who are capable of interacting positively under the social protection system. This means that the focus has shifted towards the development of an individual who is able to participate in the development process, expand his or her choices and capabilities in order to provide development as reflected in the UN definition of social welfare. This concept conforms with the guidance of HH the Emir on the need to move from the reactive state of simple social welfare policies to a proactive state by enabling all segments of the society to participate in national development. The social welfare pillar consists of the following sub-components:

- Social security;
- Pensions and social insurance;
- Empowerment and employment support of vulnerable groups; and
- Housing.

Social security challenges

The data provided by an analysis of the current social protection system in Qatar made it clear that because of social change, other groups, such as Qatari women married to non-Qataris, must be covered by social security benefits. Pursuant to the Emir's gesture, the Council of Ministers issued Decision No. 46 of 2014 determining the value of social security payment for various categories. The social security payments to beneficiaries increased by 200% compared to 2013, resulting in higher social security coverage and a higher number of social security beneficiaries by 80% during 2007-2015 (Figure 5.1.1).

Available data indicate that 13% of beneficiaries are in working-age despite the availability of jobs in the labour market. This is due to the fact that the programme currently in place does not encourage working-age beneficiaries to participate in the labour market. Moreover, their qualification and training opportunities are inadequate given the scarcity of training centers. Most of the working-age beneficiaries are females with very limited levels of education. In addition to training, which is mostly restricted to public sector employees, there are no listing services in the labor market in Qatar. The MADLSA Training Department seems to have limited capacity to absorb all the able-bodied beneficiaries of the Social Security program.⁹¹ Thus, the main challenge to the social security system is the need to consolidate and sustain the system and to set a ceiling for social security transfers to the beneficiary families.

91 The Social Protection and Labour Sector Report, WB, 2016, unpublished report.

Figure (5.1.1): Social security beneficiaries and total social security disbursements during 2007-2015



Source: MADLSA, 2016

Social insurance challenges

Retirement and pension systems (civil and military) in Qatar are one of the world’s newest schemes, with a short pensionable service of 15 years, a low monthly contribution rate of 15% and a pension accrual rate of 75% of the last salary.⁹² The situation analysis suggests a high cost of these systems, resulting in an inflated actuarial deficit because contributions are disproportionate to pensions. In 2015, the contributions to the Civil Fund amounted to QAR 3.4 billion, while the pensions were QAR 2.3 billion, with a surplus of only 33%. As for the Military Fund, the contributions amounted to QAR 575 million, while the pensions were QAR 979 million, with a deficit of 70%. Figure 5.1.2 shows a decrease in the difference between contributions and pensions since 2010, which suggests that the systems cannot be sustained as the costs of bridging the revenue / expenditure gap are borne by the State alone. The current situation of pensions and social insurance can be summed as follows:

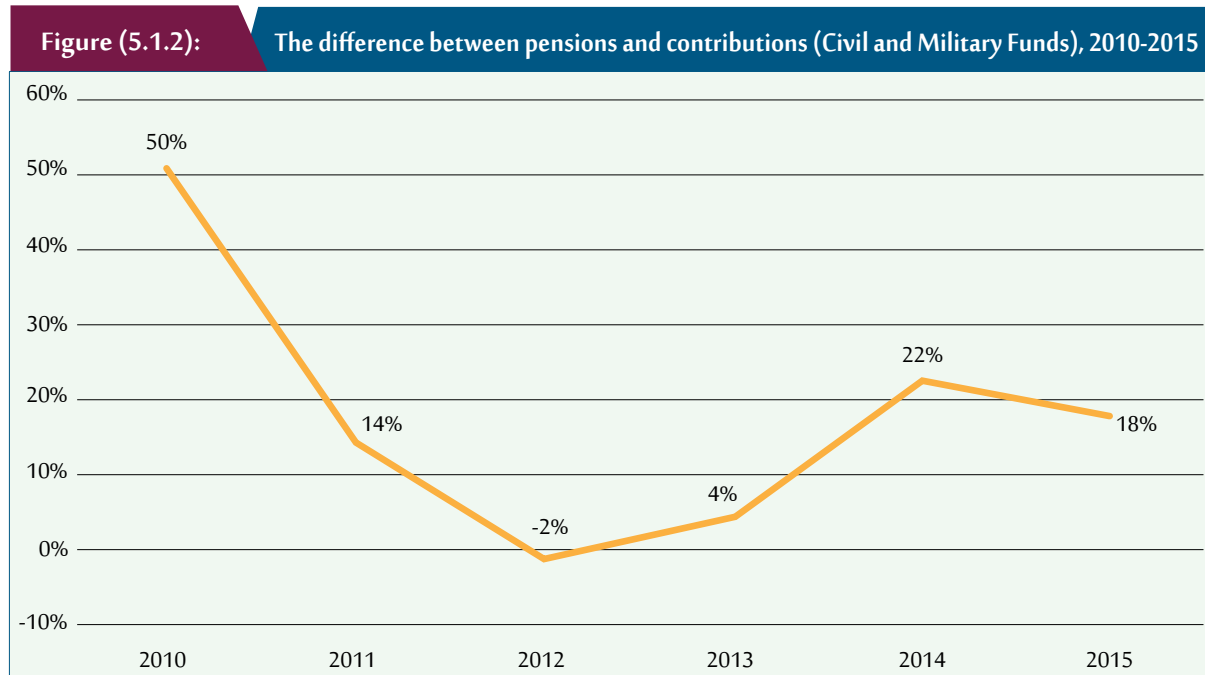
- The period of pensionable service is not commensurate with the pension term.
- The monthly contribution rate of 15% is insufficient to finance a monthly pension accrual rate of 75%.
- Insurance does not cover all citizens working in the private sector and outside the state of Qatar.

This situation has resulted in a number of challenges that threaten the financial sustainability of the retirement system, namely:

- The current legislation encourages and increases early retirement.
- It is difficult to maintain the growth of the financial position of pension funds in light of volatile financial markets and low oil prices.

92 The General Retirement & Social Insurance Authority’s website.

- Reliance on State treasury support.
- Sustainability of retirement pensions.



Source: General Retirement and Social Insurance Authority (GRSIA), 2016

Challenges in empowerment and employment support for vulnerable groups

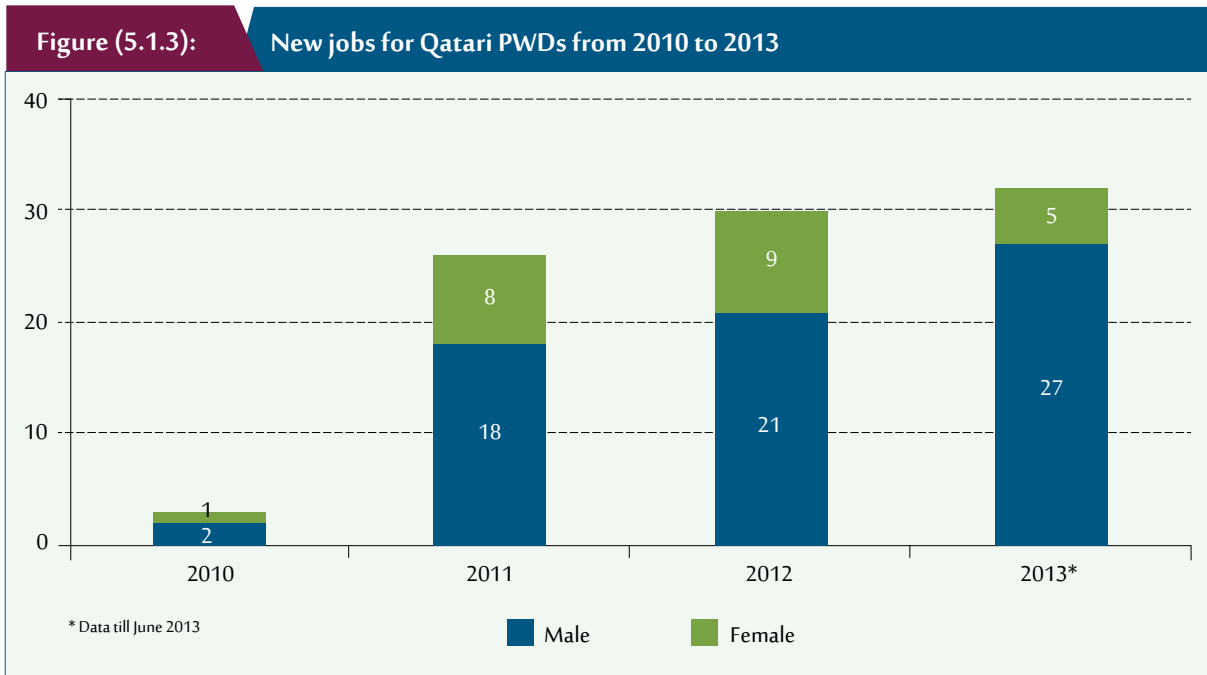
A better progress was made in providing PWDs with support and the necessary means to enable them to exercise their rights, particularly in the areas of employment and education. According to the available data, jobs for Qatari PWDs increased as of 2010 (Figure 5.1.3) with the number of appointed PWDs over 2010-2013 totaling 91, including 68 males (75%). However, the levels of education and employment of PWDs remain lower than those of the general population. It is therefore hoped that more effort will be exerted toward more effective employment in line with the current law that stipulates that the PWD employment rate shall not be less than 2%. In addition, an effective monitoring mechanism must be introduced to ensure this goal.

For the elderly, Qatar supports active ageing and the empowerment of older persons through providing opportunities for participation in all aspects of social, economic, cultural and political life. Focusing on the elderly in policies and programmes, particularly those affecting their rights which include healthcare, services compatible with the age group, pensions and an enabling physical environment, becomes increasingly important. The well-being of older persons should be promoted through the amendment of legislation that adversely impacts their welfare.

With regard to juvenile delinquents, MADLSA runs a number of supervisory, care and rehabilitation programmes, with the number of beneficiaries increasing from 247 in 2011 to 571 in 2015. The vast majority of those delinquents are males who committed crimes against private property or persons. According to a linear trend, the number of juvenile delinquents in 2022 is expected to reach 1,000 children.

Although there has been a significant progress in caring for and employing the vulnerable groups of the disabled, the elderly and juvenile delinquents, however, it falls short of the ambition in view of the challenges facing this segment of society.

There is an urgent need to create appropriate job opportunities for vulnerable groups, provide them with proper training and qualification, develop systems, coordinate among stakeholders, and develop a database and methodology to measure social protection indicators for this group.



Source: MADLSA

The main challenges to empower and employ the vulnerable groups are:

1. Poor coordination, integration and partnership among the three sectors (government, private and civil society) to support vulnerable families and small entrepreneurs;
2. The need to create appropriate job opportunities for the vulnerable groups and to provide them with proper training;
3. The need to develop a database on vulnerable groups and the jobs available to them;
4. A lack of awareness programmes for vulnerable groups on the importance of work;
5. The need for a comprehensive assessment of the services provided to PWDs, orphans, juveniles, older persons and other groups in need of care;
6. The sustainability of existing healthcare systems to accommodate the growing numbers of older persons with a need for healthcare;
7. A need for trained staff on ageing and the elderly issues;
8. A need for caregiver grandchildren;
9. A scarcity of scientific studies on vulnerable groups; and

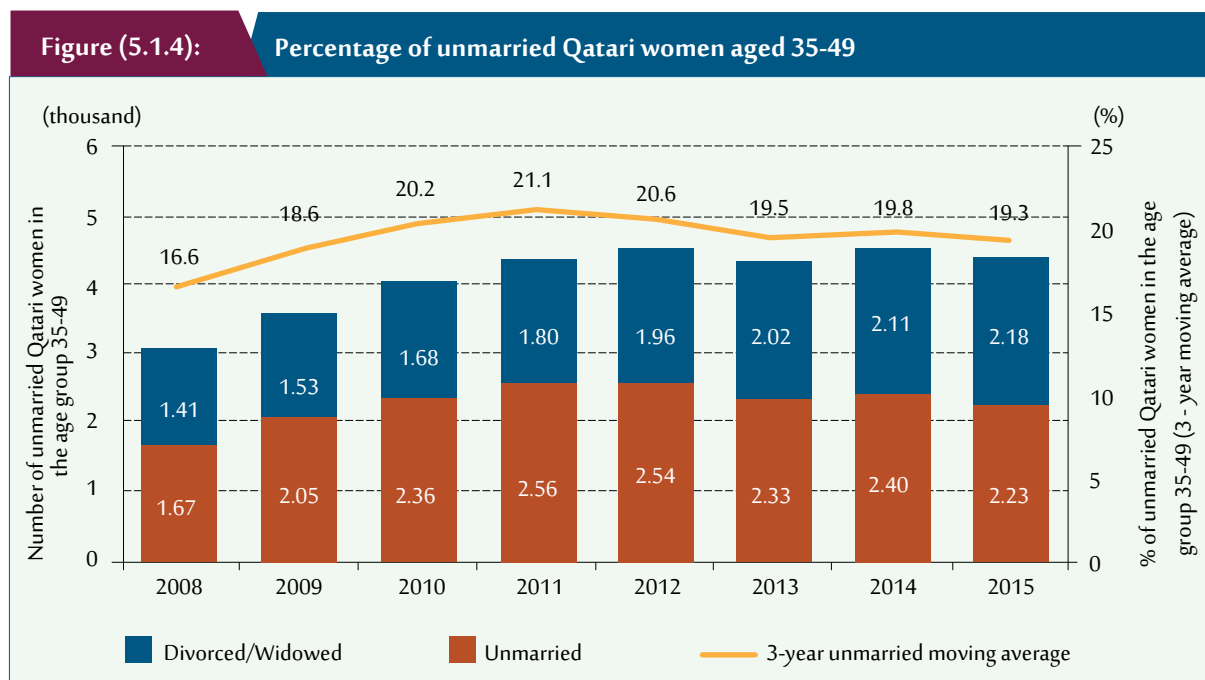
10. Poor available tools for raising the awareness of vulnerable groups and their families about their rights, services and support methods available with a view to ensuring their access to all basic services and exemption from all fees related to their needs.

Housing challenges

There has been a significant progress in enacting laws and legislation that have overcome many housing challenges and issues, however, the slowness and numerousness of systems and procedures for access to land, loans and building permits, continue to be one of the major impediments facing Qataris in accessing housing. Other housing challenges include the lengthy waiting time to obtain a lot of land suitable for building and to secure a loan. There is also a need to add new groups, such as divorcees, widows, single women and families who have experienced crises and accidents such as fire or financial distress. A high level umbrella committee headed by the concerned minister and with representation from all relevant housing stakeholders is needed to develop a comprehensive vision of all housing issues.

Challenges of Qatari family development pillar

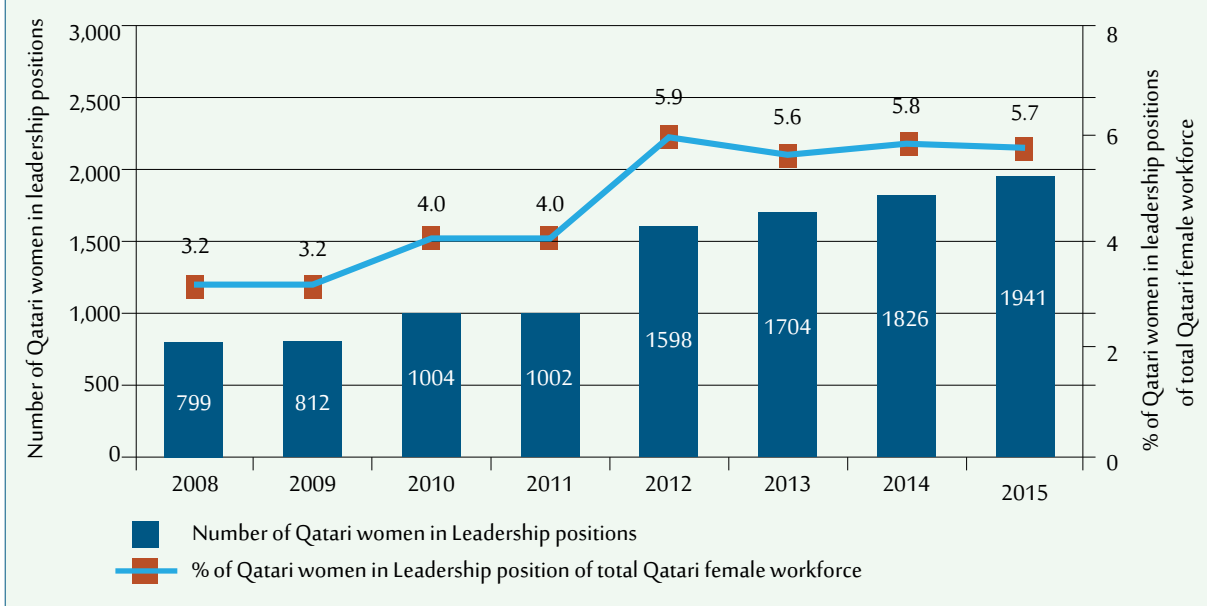
In light of the QNV 2030 and its goal of building a prosperous, secure and caring society where Qatari families play a critical role in instilling cultural, religious and ethical values and maintaining a strong Arab and Muslim identity, the SPS aims to continue to work towards QNV 2030 goals within a comprehensive framework. The SPS provides civil society and the private sector with an opportunity to participate effectively in the development of Qatari families and emphasizes Qatar's commitments towards international conventions through its ratification of the Convention on the Rights of the Child in 1995, the International Convention on the Rights of Persons with Disabilities in 2008, and the Convention on the Elimination of all Forms of Discrimination against Women (CEDAW) in 2009. In this context, the proportion of unmarried Qatari women in the 35-49 age group decreased between 2011 and 2015 (Figure 5.1.4).



Source: MDPS, Labour Force Survey, different years; and the 2010 Census data

The NDS-1 Mid-term review showed that the number of women holding leadership positions in the public and private sectors during 2008-2012 exceeded the target increase of 30%, but their participation in leadership positions remains low as shown in Figure 5.1.5.

Figure (5.1.5): Number and percentage of Qatari women in senior positions



Source: MDPS, Labour Force Survey, different years

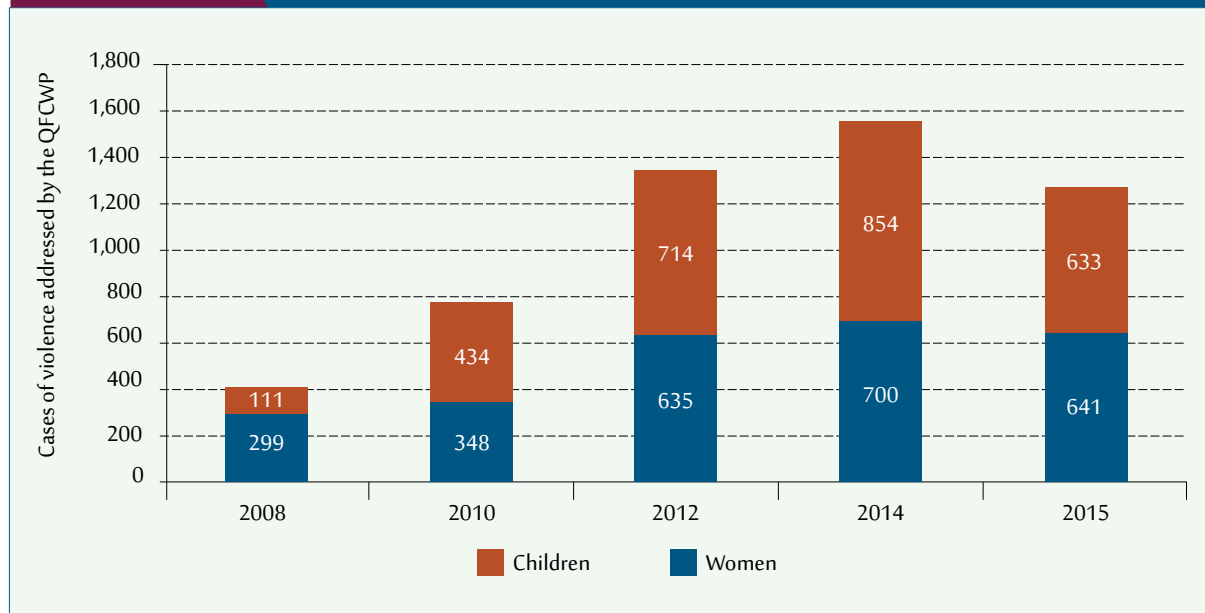
Qatari women’s labour force participation rates over 2012-2015 remained stable at 36% despite a substantial progress in improving work-life balance through reviewing the Human Resource Law of 2009. The improved favorable work environment for women resulted in a significant increase in the number of kindergartens and nurseries and the number of Qatari children enrolled in them by 71% and 65% respectively, between 2011 and 2015.⁹³ Although women’s participation in paid employment has increased, however, they continue to face challenges in entrepreneurial activities involvement.

In the area of family financial protection from destitution, despite the State’s support to the family through the creation of job opportunities, housing, social security, pensions and social insurance, Qatari families are heavily indebted owing to an excessive consumerism culture and poor financial management, which is a threat to the stability and cohesion of Qatari families, particularly for low-income families. Nearly 10% of households were classified as relatively poor in 2012/2013, i.e. they receive half of the median household income.⁹⁴

With regard to strengthening social protection for the vulnerable groups, the number of domestic violence cases in 2015 was less than that in 2014 following an upward trend in previous years since 2008 (Figure 5.1.6). The Protection and Social Rehabilitation Center of Qatar Foundation for Social Work makes outstanding efforts in this area to raise awareness on the importance of caring for children and women away from violence, in addition to the role of the Family Consulting Center (FCC). There is an urgent need for nationals with competencies in the area of family and child protection and in raising awareness on the risks and consequences of violence. There is also an urgent need to review and develop family protection legislations and policies, and coordination between government institutions and CSOs concerned with family protection and child welfare.

93 MDPS, Annual Statistical Abstract, Education Statistics, different years.

94 GSDP, MTR report (unpublished), 2013, p.118.

Figure (5.1.6): Cases of domestic violence addressed by the Social Protection and Rehabilitation Center

Source: MDPS 2016, Annual Statistical Abstract, civil society services, different years

In references to juvenile delinquents, the number of beneficiaries of delinquent juvenile supervision, care and rehabilitation programmes provided by the MADLSA increased from 247 in 2011 to 571 in 2015. The vast majority of those delinquents are males who committed crimes against private property or persons. Based on linear projections and the previous data, the number of juveniles is expected to increase during the coming years. This may suggest shortcomings in parenting, especially with the heavy reliance of many families on domestic workers. The average number of domestic workers per household increased from 1.5 in 2004 to 3.0 in 2010⁹⁵ then to 3.4 in 2015 according to the Labour Force Survey data.⁹⁶

Qatar has made remarkable progress in the physical, health and educational well-being of children, with more than 95% of infants below the age of one year having all types of basic vaccines. Over time, the infant mortality rate in Qatar declined significantly from 10 deaths per 1,000 live births in 2000 to about 4.6 in 2015. Mortality rates among under-4 children dropped from 2.3 deaths per 1,000 births in 2000 to 1.3 in 2013. In the academic year 2014/2015, the total proportion of Qatari children under-4 enrolled in pre-kindergarten was 23.4%, while the percentage of Qatari children aged 4 to 5 who were enrolled in kindergarten was 95.4%.⁹⁷

A situation analysis of the Qatari family development pillar focusing on a variety of family issues, which included marriage, divorce, parenting, child care, domestic violence, economic and social situation of Qatari families, and the well-being of children; shows specific and common challenges among and between these family issues. Common challenges include a lack of community awareness of the consequences of these issues; inadequate media role in building awareness; poor coordination among CSOs, the private sector and the government; and weak involvement of the private and civil sector in addressing these issues. The specific challenges of family cohesion issues include:

⁹⁵ NDS 2011-2016- MTR report (unpublished).

⁹⁶ MDPS 2015, Labour Force Survey 2015.

⁹⁷ MDPS, Annual Statistical Abstract, different years.

As for the marriage and divorce issues, the following challenges impede family cohesion:

- High social, psychological, health and economic costs due to late marriage and non-marriage of young people in light of the demographic changes in Qatar; namely, the increased number of young people; and
- The rising financial cost of marriage despite the various forms of support provided by the State to encourage the young people to get married.

Challenges facing parenting and child care include:

- A reduced role of parents and extended family in child upbringing and education, with heavy reliance on low-skilled domestic workers to carry out this responsibility and the impact on the children's national identity;
- The need for a legislative framework and family policies in support of parenting which are in tandem with the values of Qatari society and that meet international standards; and
- The need for scientific assessment of parenting and maternity policies and programmes.

Challenges arising from domestic violence against women and children include:

- A need to support the protection of women and children from all forms of domestic violence through the review and development of family protection legislation and policies; and
- A need for trained nationals working in the field of family and child protection.

With regard to the economic situation of Qatari families, an excessive consumerism culture has resulted in a number of challenges, mainly:

- Poor knowledge of family finance and budget management; and
- A need to empower women to become economically self-reliant and increase their participation in the labour market and in entrepreneurship.

Despite the significant progress in the physical, health and educational well-being of children, there are still challenges to be addressed for a better childhood in Qatar. Such challenges can be summed up as follows:

- A need for a national umbrella that brings together all the sectors involved in children's issues to develop strategies and policies, assess programmes and follow up coordination among relevant sectors;
- A need for a national strategy for childhood that conforms to the values of the Qatari society and to international charters and standards;
- A need for scientific studies on childhood; and

- A need for a database and indicators to measure children's well-being according to international standards.

Challenges facing Social Capital Pillar

As defined in the NDS-1, the social capital of any society includes the institutions, relationships, attitudes and values that govern interactions among people and contribute to economic and social development. Qatari families are a major resource in that network of social relations and they complement the role of CSOs and NGOs.

Societies in general experience changes in social capital during modernization and rapid development periods. Such changes can adversely affect vulnerable and disadvantaged social segments causing them to be trapped in poverty, diseases and destitution. The NDS-1 therefore focused on the implementation of initiatives aimed at protecting individuals from the potential risks of a declined social capital concomitant with a rapid economic prosperity. Building social capital requires responsible and social protection-friendly institutions, delegating greater responsibility for social services to local institutions and NGOs. By their nature, these organizations are closer and more responsive to the needs of families and communities enabling them to provide effective solutions to empower poor and vulnerable groups, reduce inequality and discrimination, ensuring that no one is left behind, building social cohesion, and enshrining deep-rooted cultural practices and norms.

The NDS-1 implementation period witnessed a CSOs activity that was based on the cultural heritage of society and values derived from the principles of Sharia and from Qatar's permanent Constitution, and consistent with the political will that supports broad and effective partnership base among the government, the private sector and civil society. The collective responsibility of the three sectors for planning, monitoring, correcting the path and achieving sustainable development is a feature of this era. It is indisputably the era of a bottom-up participatory civil society and mobilization of the huge potentials of the society in creating social capital; building capacity and enhancing charity and humanitarian action; increasingly advancing the role of CSOs in sustainable development. Moreover, this led to the broadening of people's participation in identifying and resolving certain social challenges, such as unemployment, extreme poverty, family disintegration, violence, and paternal absence, all of which are correlated challenges.

In this context, the space for CSO participation has expanded, through the encouragement of social organization by political leadership to establish social development projects that target the public goods and are managed with full autonomy. These projects covered many facets of social and cultural work, while supporting them with headquartering facilities and funding. The State also continues to provide material and technical support to humanitarian and charitable institutions to help them achieve their missions and objectives.

The NDS-1 implementation period saw many achievements through the distinctive role of CSOs, such as the QF and the QFSW, in support of social protection. However, many challenges still face the efforts to achieve a continuous and sustainable growth of social capital. The existing institutional environment continues to limit the inherent developmental capabilities and growing social capital. Moreover, noticeably, the civil society's ownership in the implementation of some NDS projects was weak. Responding to this challenge requires the collective efforts of the society as a whole to make room for the civil society to play its effective development role. It is well suited for such a role as a development partner, a supporter of the vulnerable groups empowerment and a driving force in the effectiveness and efficiency of social capital providing cover for individuals from potential risks.

4. Main outcome, intermediate outcomes and targets in SPS 2018-2022

Main outcome

“An integrated, effective and sustainable social protection system”

The government of Qatar has put in place social protection systems and programmes that guarantee the citizens a dignified life, provide vulnerable segments with social welfare, and rehabilitate and integrate these groups into society in order to involve them in the development and advancement of the country.

The social protection system consists of MADLSA social security services as well as the qualification and employment services for social security beneficiaries. The role of the State is not only to provide subsidies to vulnerable segments to meet requirements of everyday life, but also to protect people against the risks of poverty through the General Retirement and Social Insurance Authority (GRSIA) retirement and pension scheme that includes civilians working in the public sector, private sector and the military personnel. CSOs play a significant role in supporting the social protection system through providing people in general and vulnerable groups in particular with social services. The QFSW takes a leading role among the CSOs in the social protection through the provision of social services in its centers located in various parts of the country. Many charity organizations, such as Qatar Charity, the Sheikh Thani Bin Abdullah Foundation for Humanitarian Services, etc., play a supporting role to the Zakat Fund that in turns supports poor and needy families. Qatari families also have a prime role to play in protecting their members from the risks of poverty and destitution, and maintaining family cohesion in the face of challenges arising from accelerated social and economic changes.

The SPS 2017-2022 will ensure the integration of the social protection system across the various sectors that support the social protection network to ensure their effectiveness and sustainability so that the entire burden is not shouldered by the government alone. The strategy will work to reach this main outcome through achieving the intermediate outcomes and targets of the three pillars of the SPS as follows:

Intermediate outcome 1: An integrated, effective and sustainable social welfare system

Social welfare is a joint effort between the government, CSOs and private sector institutions, seeking to provide social services to all individuals and is enshrined in legislation and laws that make it a human right that must be implemented. Qatar has made great strides in the application of modern social welfare concepts in accordance with legislation and laws enacted since 1962. The social welfare pillar consists of the following sub-components:

- Social security;
- Pensions and social insurance;
- Empowerment and employment support of vulnerable groups; and
- Housing.

The SPS will ensure the integration of the various components of social welfare to ensure their effectiveness and sustainability through the following targets:

- **Target 1:** Develop three social protection regulations and legislation by the end of 2022.

The NDS will work to reach this target through the implementation of a program in information and research on social program. A second program will focus on developing social protection laws and systems. The two programmes include five projects.

- **Target 2:** Promote job and social qualification opportunities for 70% of the working-age vulnerable groups who are able to work, during 2018-2022.

Pursuant to the guidance of HH the Emir to transition from the reactive state of simple social welfare policies to a proactive state by enabling all social segments to participate in national development. The SPS will work to reach this target through implementation of 11 projects under a programme to empower and care for vulnerable groups.

- **Target 3:** Make 50% of the services provided in service delivery outlets operational during 2018-2022.

This target will be reached through the implementation of a programme intended to develop and strengthen a system of integrated and comprehensive services for the beneficiaries of the welfare services. The programme consists of 11 projects.

Intermediate outcome 2: A strong, cohesive, and empowered Qatari family

Family is the main building block of social structure and societal cohesion. Family policies therefore derive from the realization that the promotion of family cohesion and its protection from disintegration, form the basis for addressing societal challenges in a comprehensive manner. Furthermore, family is the institution in which young people are reared and future generations are raised to lay the foundations that will enable Qatar to catch up with the developed countries. The Qatari family development pillar includes a range of key components that address the issues of late marriage, high divorce rates, parenting, child care, domestic violence, strengthening the economic status of Qatari families and enhancing social capital.

The Strategy will focus on the development of the Qatari family, strengthening its cohesion, and socially and economically empowering family members through the implementation of a number of new as well as NDS-1 continued programmes and projects. The following targets will be achieved:

- **Target 1:** Develop policies on family and childhood, by 2022.
- **Target 2:** Improve progress of economic and social empowerment projects for youth at an annual rate of 5-20% until 2022 with a baseline of the year 2016.
- **Target 3:** Improve progress of family and marriage cohesion projects at an annual rate of 10-70% until 2022 with a baseline of the year 2016.
- **Target 4:** Improve progress of the projects of prevention and protection from violence at an annual rate of 10-30% until 2022 with a baseline of the year 2016.

Intermediate outcome 3: An increased scope and effectiveness of social capital

The SPS 2017-2022 will focus on increasing the scope and effectiveness of social capital and creating strong partnerships among CSOs, the private sector and the government, to contribute to social protection programs and projects in Qatar. This partnership will enhance the sustainability of social protection systems by delegating some of the responsibilities for social services from government bodies to CSOs, NGOs, local charities and voluntary associations.

The SPS will achieve this intermediate outcome by working towards the following targets:

- **Target 1:** Extend the scope of CSO services related to the protection of social capital at an annual rate of 20% during 2018-2022 using 2016 as a baseline year.
- **Target 2:** Enhance voluntary social work and community participation by increasing the number of active participant private sector institutions and CSOs by 20%, by the year 2022 compared to the baseline year of 2016.

The implementation of the projects included in the programs to develop and strengthen CSO capacity and activate volunteerism is expected to extend the scope of CSO services geared to protect and sustain fundamental relations in the Qatari society. Expanding an active partnership among government agencies, civil society organizations and the private sector will promote social responsibility towards the society. Furthermore, fostering an institutional environment that supports social capital development will also help the civil and private sectors play their respective roles.

5. Conclusion:

The SPS strategy is a vital and integral part of the social development policy of Qatar and a key instrument to meet the requirements of sustainable development. The NDS-2 seeks to develop policies, programmes and mechanisms to protect and promote family cohesion and social protection for all citizens, empower different categories of society, equip them with the required skills, and ensure their rights to lead a healthy, dignified and safe life, while maintaining the system of social values and culture. Social protection and family cohesion are therefore an essential component of an integrated and sound social development approach aimed at achieving the well-being of Qatar and its citizens, and building a society that is safe, secure, and resilient against all social challenges and threats.

The SPS Strategy 2017-2022, with its three pillars of social welfare, Qatari family development and social capital development, is an extension of the State's efforts to achieve the results and objectives of the NDS-1 (2011 - 2016) which constituted the starting point in the path to achieve QNV 2030 goals. It is worth mentioning that the second SPS deals with new issues of concern to Qatari citizens and families and touches upon new themes that address the role of social capital in enhancing family cohesion and ensuring the sustainability of the social protection system.

The SPS Strategy will seek to achieve a key sectoral outcome: An integrated, effective and sustainable social protection system through the translation of intermediate outcomes and their targets into new and continued programmes and projects from the NDS-1. In addition to financial, technical and human resources, the implementation of these programmes and projects requires a great deal of coordination and cooperation between the implementing and supporting agencies. There is a wealth of experience and lessons learned by various sectors in the State from the implementation and follow-up of NDS-1 projects and programs that can be utilized by the SP sector in implementing the sector strategy of NDS-2.

6. Annex:

Intermediate outcomes, targets, programmes/projects and implementing and supporting agencies that contribute to the main outcome of “An integrated, effective and sustainable social protection system”

Intermediate outcomes	Targets	Programmes/Projects		Implementing agencies	Support agencies
		Programmes	Projects		
Intermediate outcome 1: An integrated, effective and sustainable social welfare system	1.1 Develop three social protection regulations and legislations by the end of 2022	Program 1: Information and research on social protection	Project 1: Electronic linking among social protection stakeholders	MADLSA	MOI MME MEC QFSA MOPH HM MOEIA MOJ
			Project 2: Develop a comprehensive database of target groups of the protection system		
		Program 2: Develop and improve social protection systems and legislations	Project 1: Establish national committees to develop strategies and policies on family, childhood, the elderly and PWDs, and follow up on coordination among relevant sectors Project 2: Develop social protection legislations (all bills serving social protection in the areas of housing, social security, retirement and pensions, family, childhood, older persons, PWDs, associations and institutions)	MADLSA	QFSW QF MOJ
			Project 3: Develop the pension fund investment system (performance monitoring and evaluation)	GRSIA	

Intermediate outcomes	Targets	Programmes/Projects		Implementing agencies	Support agencies
		Programmes	Projects		
	<p>1.2 Promote job and social qualification opportunities for 70% of the working-age vulnerable groups who are able to work, during 2018-2022</p>	<p>Program 1: Empower and care for vulnerable groups</p>	<p>Project 1: Qualify and employ social security pension beneficiaries who are of working age</p>	MADLSA	Companies covered by Qatarization
			<p>Project 2: National Work from Home Project</p>	QDB	MADLSA
			<p>Project 3: National Small Enterprise Strategy</p>		
			<p>Project 4: Update vocational qualification and training programs for PWDs</p>		
			<p>Project 5: Mutual cooperation with the educational sector (public, private) to integrate PWDs</p>		
			<p>Project 6: Community awareness of PWD issues and rights</p>	Shafallah	QFSW
			<p>Project 7: Family support for PWDs and their families</p>	Best Buddies Qatar Initiative	MADLSA
			<p>Project 8: Implement community activities to further integrate PWDs</p>		
			<p>Project 9: Job and community qualification for PWDs</p>		
			<p>Project 10: Comprehensively develop PWD skills</p>		
			<p>Project 11: Community markets</p>	MADLSA	QDB QFSW MME

Intermediate outcomes	Targets	Programmes/Projects		Implementing agencies	Support agencies
		Programmes	Projects		
	1.3 Make 50% of the services provided in service delivery outlets operational during 2018-2022	<p>Program 1: An integrated and comprehensive service system for beneficiaries of social protection services</p>	<p>Project 1: Enhance and develop social development centers</p>	MADLSA	CSOs Qatar Chamber private sector companies
			<p>Project 2: Strengthen welfare service delivery outlets</p>		
			<p>Project 3: Provide psychosocial healthcare services for older persons</p>	Center for Empowerment and Care of the Elderly (Ehsan)	QFSW MADLSA
			<p>Project 4: Home care services for the elderly</p>		
			<p>Project 5: Day care (senior clubs)</p>		
			<p>Project 6: Qualification services for older persons</p>	Shafallah	QFSW MADLSA
			<p>Project 7: Build awareness on the issues and rights of older persons</p>		
			<p>Project 8: Community outreach for awareness and education on PWD rights</p>		
			<p>Project 9: upgrade health services provided to PWDs</p>		
			<p>Project 10: enhance educational services for children with disabilities</p>		
			<p>Project 11: Develop therapeutic rehabilitation services</p>		

Intermediate outcomes	Targets	Programmes/Projects		Implementing agencies	Support agencies
		Programmes	Projects		
Intermediate outcome 2: A strong, cohesive and empowered Qatari family	2.1 Develop policies on family and childhood, by 2022.	Program 1: Develop family-related policies	Project 1: Develop a national strategy proposal to strengthen a coherent and empowered Qatari family	MADLSA	QF QFSW MOJ
			Project 2: Prepare and develop a proposal for indicators to measure family cohesion		
			Project 3: Conduct a study on proposed policies and mechanisms to enhance family safety		
		Program 2: Develop childhood related policies	Project 1: Develop a national childhood strategy proposal Project 2: Prepare and develop a proposal for indicators to measure child welfare	MADLSA	QF QFSW MOJ
Program 3: Care and empowerment of Orphaned children	Project 1: Family custody of orphans Project 2: Develop internal care services for orphans Project 3: Build Community awareness of orphans' rights Project 4: Family stability of cases under custody	Orphans Care Center (Dreema)	QFSW		

Intermediate outcomes	Targets	Programmes/Projects		Support agencies
		Programmes	Projects	
	2.2 Improve progress of economic and social empowerment projects for youth, at an annual rate of 5-20% until 2022 with a baseline of the year 2016	Program 1: Economic and social empowerment of the youth	Project 1: Develop social entrepreneurs	Center for Social Development (Nama) QFSW
			Project 2: Support vocational education and development	
			Project 3: Social welfare services	
			Project 4: Entrepreneurship support (for small and micro enterprises)	
	2.3 Improve progress in family and marriage cohesion projects at an annual rate of 10-70% until 2022 with a baseline of the year 2016.	Program 1: Strengthen family cohesion and marriage bonds	Project 1: Encourage and help the youth to get married	MADLSA QFSW MOEIA family Consultation Center (Wefaq)
			Project 2: Enhance and strengthen family ties	
			Project 3: Minimize the negative impacts of divorce on divorcees and children	
			Project 4: Strengthen the culture of responsible parenthood	
	2.4 Improve progress of the projects of prevention and protection from violence at an annual rate of 10-30% until 2022 with a baseline of the year 2016.	Program 1: Prevention of and protection from violence	Project 1: Protection from violence and family disintegration	Protection and Social Rehabilitation Centre (Aman) QFSW MADLSA
			Project 2: Rehabilitation and care for victims of violence and family disintegration	
			Project 3: Childhood without violence	
			Project 4: Women empowerment and education	
			Project 5: Community partnerships against violence	

Intermediate outcomes	Targets	Programmes/Projects		Implementing agencies	Support agencies
		Programmes	Projects		
Intermediate outcome 3: An increased scope and effectiveness of social capital	3.1 Extend the scope of CSO services related to the protection of social capital at an annual rate of 20% during 2018-2022 using 2016 as baseline year	Program 1: Build and develop CSO capacities	Project 1: Build and develop the capabilities of the QFSW and its affiliated centers	QFSW	QFSW
			Project 2: Service expansion and geographical spread	family Consultation Center (Wefaq)	QFSW centers
	3.2 Enhance voluntary social work and community participation by increasing the number of active participant private sector institutions and CSOs by 20%, by the year 2022 compared to the baseline year of 2016.	Program 1: Strengthen partnership and enhance effectiveness of civil society and private sector institutions to serve social protection programmes	Project 1: Strengthen the role of Qatari NGOs	Qatari NGOs	Qatari NGOs
			Project 2: Support social dialogue among all stakeholders of social issues		CSOs
Project 3: Strengthen the role of the Social and Sport Contribution Fund (DAAM) in the social protection system			MADLSA	DAAM	
		Project 4: Mainstream a culture of social volunteering		Qatar Volunteer Work Center	
					MOEIA

Part V: Sound Social Development



Chapter II: Security and Public Safety



1. Introduction

Maintaining security and safety is a factor of social, political and economic stability of countries and societies. It is a precondition for economic prosperity and social well-being. Experiences indicate that insecurity and instability jeopardize public safety and lead to deteriorated economic conditions and collapsed social structure. Seeking to meet these challenges by the political leadership in Qatar is evident in more than a national document. Qatar's permanent Constitution stipulates: "The Constitution shall guarantee security, stability and equal opportunities, and the State shall safeguard the pillars of society and guarantee security and stability."

The Social Development Pillar of the QNV 2030 also stresses the importance of security and public safety: "Development of a just and caring society based on high moral standards and social welfare." The QNV, in addressing the social structure, highlights the need to "Establish a secure and stable society operating on the principles of justice, equality and the rule of law." Finally, the QNV affirms that Qatar will work to "provide security and stability to the population." This official interest is reflected in integrating a sectoral strategy for security and public safety in the NDS-1 (2011-2016) and then in the NDS-2 (2018-2022).

2. Progress toward the outcomes and targets of the security and public safety sector (2011-2016)

The Security and Public Safety Sector Strategy (SPSSS) 2011-2016 had four intermediate outcomes: an integrated and effective criminal information management system, improved traffic safety and reduced risks of road accidents, a National Building Safety Strategy (NBSS), and effective disaster management preparedness. The SPSSS also adopted seven projects to achieve these outcomes. The first result had three projects: a Unified Security System, the Najm Project aimed at rapid response to incidents, and Information Security Project. The second outcome had two projects: Traffic accidents Risk Reduction and Pedestrian Crossing. The NBSS development was based on a project to improve building specifications and reduce fire incidents. The fourth result had a single project comprised of three phases: confronting disaster preparedness, disaster response and post-disaster recovery.

The SPSSS 2011-2016 made progress in a number of sectoral outcomes. Regarding "an integrated and effective criminal information management system", an electronic database was developed to enable data flow among Ministry of Interior (MOI) relevant departments and between MOI and the Public Prosecution, in addition to increasing data safety and confidentiality, standardizing electronic communication procedures among security departments, dispensing with paper correspondence, and reducing patrols' average response time to accidents from 15 to 7-10 minutes.

In terms of improving traffic safety and reducing deaths and serious injuries, the number of road traffic injuries decreased from 39 per 100,000 inhabitants in the baseline 2008 to 29 in 2016. Road traffic deaths went down from 16 to 6.9 per 100,000 inhabitants in 2016, thus exceeding the target of 10 deaths. Fatal road accidents per 100,000 inhabitants decreased from 35.4 in 2010 to 31.7 at the end of 2016 despite the significant increase in population and in the number of private and public vehicles and the frequent road constructions.

Concerning the NBSS – implemented by the General Directorate of Civil Defense – the fire rate per 100,000 inhabitants was reduced from 57 in the baseline 2008 to 30.5 by the end of 2016. Other achievements include the issuance of the Civil Defense law, the adoption of the US Fire Fighting Code after adapting it to Qatar's environmental and urban character ,

increasing the number of establishments linked to the MOI Central Operation Room through the Early Warning System from 908 in 2008 to 3,100 in 2015, and increasing the number of establishments with fire safety certification from 1,254 in 2011 to 4,170 in 2015. With regard to national preparedness for disaster management, by the end of 2016, all phases of the project were completed and staff was trained in disasters management and responsiveness and in dealing with the post-disaster recovery phase.

3. SPSS Challenges

The first SPSS 2011-2016 encountered some challenges. While Criminal Proceedings Department was electronically connected to the Public Prosecutor's Office, there has so far been no electronic connection between the latter and courts. In addition, the number of serious traffic accidents was not reduced. This is due to increased road constructions and streets development, poor implementation of safety rules on these roads by executing companies, a delayed construction of footbridges where only one out of 15 planned footbridges was built since the construction of footbridges is linked to major projects of the Public Works Authority, poor impact of media awareness campaigns to change drivers' behavior and the excessive speed of some drivers, especially young people, a shortage of national staff necessary for information security management, and weak coordination and communication between ministries and government entities concerned with the implementation of this sectoral strategy.

Comparing the SPSS 2011-2016 to the SPSS 2017-2022 shows that the latter has maintained two out of four outcomes of the former; namely, information security and traffic safety, given the continued relevant challenges.

Information Security has been promoted from a project of the criminal information management system to a stand-alone intermediate outcome consistent with the current national priorities and entitled the Electronic Security Shield System (ESSE) that was approved by HH the Emir in 2013. The inauguration of its project was done under the patronage and presence of the Prime Minister and Minister of Interior on May 31, 2016. With the completion of this effective and integrated system by the end of 2016, there was no longer need to include it in the second SPSS. This also applied to the outcome of improving building safety. Therefore, the responsibility for it has been fully transferred to the General Directorate of Civil Defense that will continue to follow up on its implementation. With the achievement of the targets of the National Disaster Management Preparedness Policy by the end of 2016, the project was referred to the National Command Center and the Civil Defense Council provided for in Article 24 of the Civil Defense Law No. 25 of 2015.

On the other hand, the outcome of traffic safety has been maintained in view of the persistence of this challenge and the chronic nature of traffic accidents and the resulting human and material damage. The drug-control outcome has been added. It was not considered a stand-alone outcome when the status quo was analyzed in 2008; rather, it was implicitly incorporated under the fight against crime. However, the current threat of drugs to young people and the increased number of drug users and of attempts to smuggle drugs into Qatar have necessitated the inclusion of drug control as a stand-alone intermediate outcome in order to enhance social security and safeguard national human development.

The current general challenges that require intervention are poor skills of workers in State outlets to use modern methods of detecting attempts to smuggle drugs, an increased number of foreign workers and the contribution of some to drug promotion, which is expected to continue until 2022, a failure to tighten sentences of drug dealing and trafficking, weak control of narcotic drugs and psychotropic substances, a weak impact of media programs on the target group, especially young people, a delayed building of footbridges necessary to reduce the number of pedestrian deaths in road accidents, and

finally the need to attract and qualify the national staff required to manage the ESSE and overcome previous coordination difficulties among the implementing agencies of SPSSS projects.

4. SPSS Main outcome, intermediate outcomes and targets (2018-2022)

The main outcome to be achieved by the end of 2022 is “Achieving Security, stability and maintaining public safety”. Three intermediate outcomes have been identified, which together help achieve the desired main outcome based on good rationale derived from the analysis of the current social and security situation and its challenges. These results are: Protect society from drugs, road safety and a reduced number of deaths, and developing the ESSE.

Intermediate outcome 1: Protect society from drugs

This outcome is linked to the QNV 2030’s goal of achieving sustainable development since it supports the human development pillar that aims to develop a physically and mentally healthy population and build an efficient workforce that contributes to the prosperity and development of Qatari society. It is also linked to the Social Development Pillar that seeks to build citizens with good morals who adhere to the highest Islamic cultural values and strong family ties. Addiction is well known to destroy the body and mind, weaken moral standards and break family ties.

MOI statistics show a significant increase in the number of drug offenses from 461 to 4,175 (i.e. nine times) during 2011-2016, which has raised the concern of MOI and its Drug Combating Department and National Narcotics Control Committee. Further, the number of abusers increased from 594 in 2011 to 4,202 in 2016 (Table 5.2.1).

This increase is unprecedented and it needs to be explained. The relatively limited number of drug users during 2011-2013 may be due to a change in the Anti-Drug Department’s strategy to monitor and control abuse and may be due to poor registration of overall cases. The number of drug users recorded during 2011 and 2013 is not at all commensurate with the increasing number of drug smuggling and dealing crimes, especially since the two phenomena are connected to some extent.

Table 5.2.1: Number of drug offenses and users 2011-2016

Item	Year					
	2011	2012	2013	2014	2015	2016
No. of Offenses	461	439	619	2,530	3,140	4,175
No. of Users	594	634	950	2,371	3,796	4,202
Population	1,732,700	1,832,900	2,019,900	2,250,500	2,407,400	2,597,000
Average users per 100,000 inhabitants (MDPS)	34.28	34.59	47.03	105.53	157.68	161.80

Source: Number of crimes and abusers, MOI, vital statistics, MDPS

A population increase of 700,000 people over 2011-2016 is a major reason for the large increase in the number of drug users. The quantities of narcotic drugs of all kinds seized during the same period, particularly fenethylline, heroin, marijuana, tramadol and others, increased significantly. These figures indicate that drugs in Qatar have become a social challenge that needs to be addressed and contained before it is exacerbated, especially since adolescents and young people are the most vulnerable age groups and most targeted by drug dealers. A major attractive factor for regional and international drug dealers is that Qatar is a favorable and lucrative arena for drug trafficking, given the high per capita income that makes these drugs affordable. It should

be noted that the competent authorities recognize that the problem of drugs is not only a security problem, but also a complex social, health, economic and moral issue. Therefore, dealing with it from a purely security perspective will not work. Rather, it requires concerted community, family, educational, religious and media efforts to contain it and reduce its risks.

Intermediate outcome 1 of community protection against drugs has two targets: Increased number of staff trained in the fight against drugs, and increased number of beneficiaries of drug risk awareness courses. The SPSSS adopts two projects to achieve intermediate outcome 1: Qualification and training of drug control workers and their supporting entities, and drug risk awareness.

- **Target 1:** Increase the number of staff trained in drug control from 565 at the end of 2016 to 1,000 by 2022, (10% annually)
- **Target 2:** Increase the number of beneficiaries of drug risk awareness courses from 15,477 at the end of 2016 to 27,400 by 2022, (10% annually)

Intermediate outcome 2: Achieve road safety and security and reduce number of road traffic fatalities

Although this result was largely achieved in the 2011-2016 NDS-1, it has been decided to continue work and re-incorporate it into the SPSSS 2017-2022 for a number of reasons: first, traffic accidents in Qatar increase at an annual rate of 13%, which means that the total number of accidents will double by the end of 2022. This is why preventive measures of various forms should continue as a priority. The mortality of young people aged 20-40 in traffic accidents is 52% of total road traffic deaths. Qatari mortality rate out of total road traffic deaths was 16% during 2011-2016. Furthermore, there was a large and continuous increase in the number of people and vehicles (over one million vehicles by the end of 2016), making Qatar one of the world's highest countries in terms of vehicle-to-population ratio. Statistics indicate that in spite of the large increase in population over 2011-2016, the number of serious traffic accidents during the same period increased, but its rate had slightly increased from 25.3 to 25.7 per 100,000 inhabitants (Table 5.2.2).

Item	Year					
	2011	2012	2013	2014	2015	2016
No. of serious accidents	439	456	489	542	548	667
Serious accidents per 100,000 inhabitants	25.3	24.9	24.2	24.1	22.8	25.7

Source: MOI, MDPS

Item	Year					
	2011	2012	2013	2014	2015	2016
No. of serious injuries	584	608	650	694	690	871
% of serious injuries per 100,000 inhabitants	33.7	33.2	32.2	30.8	28.7	33.5

Source: MDPS and MOI

Table 5.2.3 shows that the number of serious injuries per 100,000 inhabitants was 33.7 in 2011, decreased to 28.7 in 2015 and then increased to 33.5 per 100,000 inhabitants in 2016.

Evolution of death toll in traffic accidents

The number of road traffic deaths decreased from 205 in 2011 to 178 in 2016, (13%). The mortality rate in these accidents per 100,000 inhabitants fell by seven percentage points from 13.4 to 6.9 deaths, which is less than the global average of 10, the rate the SPSSS sought to reach by the end of 2016. This outcome was achieved thanks to drivers' increased awareness of the risk of speed and to improved response of emergency ambulance services that contributed to life saving. Although the rate of pedestrian deaths per 100,000 people is low and it decreased over the period from 3.5% to 2.2%, its percentage of total road traffic deaths remained very high at 32% in 2016, which is much higher than the global average. The goal was to reduce this rate to 17% and it was not achieved due to a failure to build the proposed footbridges at the sites identified by the SPSSS.

Table 5.2.4: Road traffic deaths and pedestrian deaths

Item	Year					
	2011	2012	2013	2014	2015	2016
NO. of deaths	205	204	235	228	227	178
Deaths per 100,000 inhabitants (MDPS population figures)	12.0	11.8	11.5	10.2	9.4	6.9
No. of pedestrian deaths	60	55	56	63	66	57
Pedestrian deaths to total deaths ratio	29%	27%	24%	28%	29%	32%
Pedestrian deaths per 100,000 inhabitants (MDPS population figures)	3.5	3.0	2.8	2.8	2.7	2.2

Source: MDPS and MOI

As for road traffic death rate by age group, Table 5.2.5 shows that it is highest in the group of adolescents and youth with 48.6% for age group 10-29. Adding the deaths of age group 30-39 (not classified as young people on some subjects), they combined account for 70% of total road traffic deaths. The statistics in the table also show that the mortality rate decreases with younger or older age group, reaching 3.2% of the total deaths among those aged 60+. Most teenagers and some young people are known to drive without a driver's license and with a little experience, not to mention driving at excessive speeds as well as reckless driving.

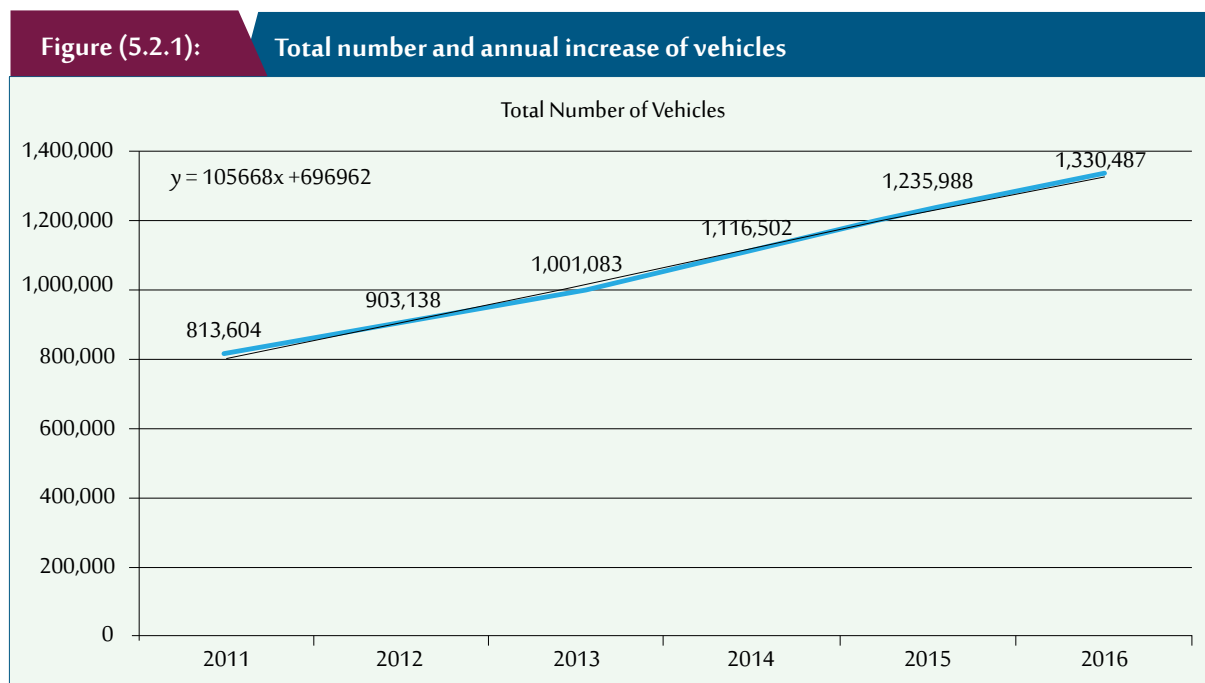
Table 5.2.5: Road traffic deaths by age group

Age	Year							%
	2011	2012	2013	2014	2015	2016	Total	
Less than 10	6	6	8	13	12	5	50	3.92
10-19	30	38	60	35	39	20	222	17.38
20-29	61	57	71	66	73	71	399	31.25
30-39	50	52	53	51	35	48	289	22.63
40-49	24	28	25	26	33	16	152	11.90
50-59	21	14	12	17	26	12	102	7.99
60+	9	4	3	12	9	4	41	3.21
Unknown	4	5	3	8	0	2	22	1.72
Total	205	204	235	228	227	178	1277	100

Source: MDPS and MOI

Continuous increase in the number of cars and heavy vehicles

There is a positive correlation among three phenomena: increased population, increased number of vehicles and increased number of traffic accidents. Having reviewed the increase in population and in the number of traffic accidents, the third element of this equation – increased number of vehicles – will be reviewed. The number of vehicles went up from 814,000 in 2011 to 1,330,000 in 2016, at an average annual increase rate of 10% or 60,000 vehicles. Based on this trend, the number of vehicles in Qatar is expected to become 1,964,978 in 2022, which requires effective preventive measures on more than one traffic level to avoid a significant rise in road accidents and ensuing deaths. The increased number of vehicles corresponds to the issuance of approximately 100,000 new driving licenses annually (Table 5.2.1). It should be noted that the impact of this type of increase may be less than what the SPSSS expects, with the completion of the construction of the Rail Project and the development of public transport in the country. A statistical assessment of the impact of these public mass transit projects on reducing congestion on roads and serious traffic accidents is desirable.



Intermediate outcome 2 includes three targets: reduced serious traffic accidents, reduced road traffic deaths, and reduced serious road traffic injuries. Two projects have been developed to achieve these goals: first, the Safe Driving Project that includes promoting driving schools, tightening procedures of driving license issuance, intensifying traffic awareness programs, and expanding radar and camera installation. The second is the “Together for a Permanently Moving Doha” Project, an electronic simulation program to ensure traffic flow and reduce bottlenecks before implementing detours. It is a joint project between MOI and the Ministry of Transport and Communications (MoTC).

- **Target 1:** Gradually reduce the serious accidents rate per 100,000 inhabitants from 25.7 in 2016 to 20 by 2022, (an average of one serious accident per 100,000 inhabitants)
- **Target 2:** Reduce road traffic deaths from 6.9 per 100,000 by the end of 2016 to 6 by 2022, (0.2 deaths per 100,000 inhabitants annually)
- **Target 3:** Reduce the number of serious injuries per 100,000 inhabitants from 33.6 in 2016 to 25 by 2022, (2 injuries annually)

Intermediate outcome 3: Electronic Security Shield Development

E-security is currently a major concern for most countries around the world with the digital storage and circulation of data, reports and files that have allowed for hacking of electronic systems. A weak electronic security is a threat to the political, military, economic and scientific security of states, and it threatens the security of private institutions such as banks, financial and commercial companies, and industrial and technological innovation centers. Qatar, like other GCC States, is subject to cyberattacks and hacks in various fields, resulting in significant material, informatics and security losses. The number of electronic crime reports in Qatar increased from 169 in 2011 to 1,105 in 2016 (Table 5.2.6).

Cybersecurity statistics of the MoTC indicate that they have managed to contain about 2,000 electronic incidents and address 851 million threats in the last three years, including 3.7 million direct hits with viruses. These attacks and threats are expected to increase in the future as Qatar increasingly uses digital technology, particularly e-government applications. These statistics show that there is an urgent need for more efforts to improve the security of electronic networks and develop informatics infrastructure in Qatar. The most enterprises targeted with e-spying and cyberattacks in 2014 and 2015 were industries, corporate software, and e-commerce, excluding retail, followed by government institutions, financial institutions, and the hotel and hospitality sector.

Table 5.2.6: Electronic crime reports registered in Qatar 2010-2016

Item	Year					
	2011	2012	2013	2014	2015	2016
Number	169	204	324	429	643	1,105

Source: MOI

Electronic protection faces several challenges, notably is that the development of protection systems partly affects the flexibility of informatics infrastructure to accommodate the changing service requirements of the country, the rapid development of threats requires flexible and sophisticated plans to manage accidents and repair the network malfunctions as quickly as possible. Indeed, the information infrastructure protection system (including laws, policies and procedures and the related implementation measures) as well as the response and recovery capacities and the qualification of national skills are still in the stage of building and development.

To face these challenges, intermediate outcome 3 includes three main goals: strengthen capabilities to protect vital informatics infrastructure of the country, develop and upgrade a system to collect and analyze developments and threats in the field of local and international electronic security, develop and submit reports to State institutions in advance, and prepare a qualified national staff. To achieve the desired outcome, three projects have been adopted: Strengthen the central operations room of electronic security, build a digital electronic evidence analysis lab, and develop an electronic security information center.

- **Target 1:** Increase the number of vital government entities able to protect informatics infrastructure from 6 at the end of 2016 to at least 30 by the end of 2022, (5 entities annually)
- **Target 2:** Increase the number of qualified national staff members from 5 in 2016 to no less than 30 specialists in electronic security by the end of 2022, (5 members annually)
- **Target 3:** Develop and upgrade a system to collect and analyze developments and threats in the field of local and international electronic security, by 2022

- **Target 4:** Prepare an annual report on developments and threats in the field of domestic and international electronic security and submit it to State institutions in advance.

5. Conclusion

Security and public safety are key to a sustained and comprehensive development with all its economic, human, social and environmental pillars. They ensure that community life is stable away from all forms of crime and of the negative effects of drugs, traffic accidents and conflicts among society members. The SPSSS 2011-2016 has contributed to the enhancement and development of this aspect in response to the challenges arising from a rapid economic growth, the accompanying population growth and its relation to the multiple cultures, values and customs. The SPSSS 2017-2022 is expected to enhance the previous achievements in this major sector, and to monitor the new challenges for which appropriate projects have been developed. However, concerted efforts must be made by the various executing and partner sectors to carry out the tasks identified for each sector under their respective strategy. There is also a further commitment by all sectoral strategies to enhance coordination and cooperation among all to proceed at the same pace to meet requirements in the given period.

6. Annex

Intermediate outcomes, targets, projects, and implementing and supporting agencies that contribute to the main outcome: "Achieving Security, stability and maintaining public safety."

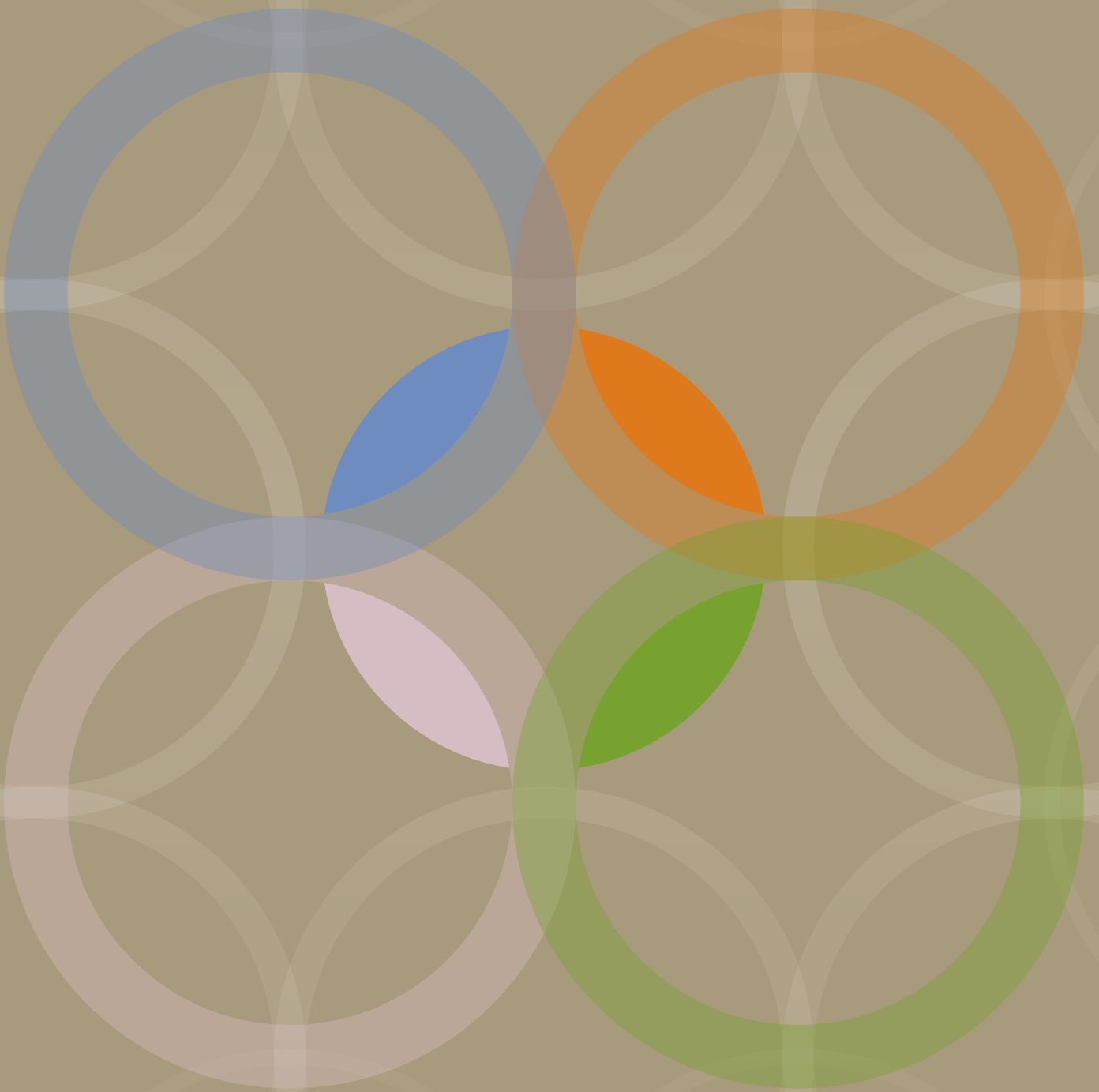
Intermediate outcomes	Targets	Programmes/ Projects	Implementing agency	Support agencies
Intermediate outcome 1: Protect society from drugs	1.1 Increase the number of staff trained in drug control from 565 at the end of 2016 to 1,000 by 2022, (10% annually)	Project: Training and Qualification of Drug Control Workers and support agencies	MOI	General Authority of Customs Qatar Airways State Security Service MME MOPH Internal Security Force (Lekhwiya)
	1.2 Increase the number of beneficiaries of drug risk awareness courses from 15,477 at the end of 2016 to 27,400 by 2022, (10% annually)	Project: Drug Risk Awareness	MOI	National Drug Control Committee
Intermediate outcome 2: Achieve road safety and security and reduce number of road traffic fatalities	2.1 Gradually reduce the serious accidents rate per 100,000 inhabitants from 25.7 in 2016 to 20 by 2022, (an average of one serious accident per 100,000 inhabitants)	Program: Safe Driving	MOI	National Road Safety Committee
	2.2 Reduce road traffic deaths from 6.9 per 100,000 by the end of 2016 to 6 by 2022, (0.2 deaths per 100,000 inhabitants annually)			
	2.3 Reduce the number of serious injuries per 100,000 inhabitants from 33.6 in 2016 to 25 by 2022, (2 injuries annually)			
Intermediate outcome 3: Electronic Security Shield Development	3.1 Increase the number of vital government entities able to protect informatics infrastructure from 6 at the end of 2016 to at least 30 by the end of 2022, (5 entities annually)	Project: Central Electronic Security Operations Room Project: Digital Analysis Lab	MOI	State operators of critical informational infrastructure

Intermediate outcomes	Targets	Programmes/ Projects	Implementing agency	Support agencies
	<p>3.2 Increase the number of qualified national staff members from 5 in 2016 to no less than 30 specialists in electronic security by the end of 2022, (5 members annually)</p>	Digital Analytical Lab		
	<p>3.3 Develop and upgrade a system to collect and analyze developments and threats in the field of local and international electronic security, by 2022</p> <p>3.4 Prepare an annual report on developments and threats in the field of domestic and international electronic security and submit it to State institutions in advance.</p>	E-Security Information Center		

Part V: Sound Social Development



Chapter III: Cultural Enrichment and Sports Excellence



1. Introduction

In his Forward to the QNV 2030, HH Sheikh Tamim bin Hamad Al-Thani, the Emir of Qatar said:

“QNV 2030 builds a bridge between the present and the future. It envisages a vibrant and prosperous country in which there is economic and social justice for all, and in which nature and man are in harmony. Strong Islamic and family values will provide our moral and ethical compass.”

Pursuant to Emiri Decree No. 4 of 2016 amending certain provisions of Emiri Decree No. 16 of 2014 that sets the competencies of ministries, a Ministry of Culture and Sports (MOCS) was established by merging the Ministry of Culture, Arts and Heritage and Ministry of Youth and Sports. The MOCS is responsible for developing the Culture and Sports Sector Strategy (CSSS) 2017-2022 that aims to strengthen NDS-1 (2011-2016) achievements and seeks further achievements that contribute to the QNV 2030. The CSSS also helps the culture and sports sector carry out its mission of serving the society effectively and efficiently, and supports it to achieve development, progress and prosperity through an accelerated development process while preserving its identity and values derived from Islam and its cultural heritage.

Since young people are a major part of the social fabric, this sector is the focus of the government that seeks to advance education and healthcare, encourage physical sports and promote culture. This is what the CSSS seeks to achieve by making sports and culture part of the daily activities of Qatari youth rather than just occasional festive events. This necessitates intensifying activities to become frequent, renewed and spontaneous.

First culture and sport strategies (2011-2016)

The first Culture Sector Strategy (CSS) aimed to “promote intercultural understanding, protect and develop Qatar’s cultural heritage, preserve national identity, promote cultural knowledge among young people, attract and nurture talents to enrich and stimulate the culture sector, increase interest in culture, and promote Qatar as a vibrant cultural destination.” (CSS 2011-2016: Mid-term review, unpublished report, April 2014). Current situation analysis at that time showed a number of key cultural challenges, such as globalization effects on national cultural values, a scarcity of innovation in cultural education, limited opportunities and specialized training for young people to learn arts, and the absence of a comprehensive framework for artists’ development and of a database on the types and levels of cultural activities and their impact.

To address the aforementioned challenges, six outcomes were identified: use culture as a platform to establish national identity and encourage intercultural understanding; protect and develop Qatar’s cultural heritage to establish national identity; use culture to improve young people’s learning, build their self-esteem and help them realize their full potentials; attract and nurture high-quality talents and stimulate the growth of the cultural sector; encourage more interest in culture through research and information about the potential and growth of the culture sector; and promote Qatar’s image and status as a vital cultural platform and cultural exchange center. This was followed by identifying seven projects to achieve these outcomes.

For sport, the NDS-1 (2011-2016) sought to develop national commitment to a healthy and active lifestyle by increasing community participation in sports, achieving sports excellence and building Qatar’s future as a global sports hub. Major challenges faced by the sector are the sedentary and physically inactive lifestyles that may lead to increased risk of obesity, high blood pressure, heart diseases and diabetes; low exercise level, especially among Qatari women, and the factors that hinder their participation; limited knowledge of the importance of physical activity and appropriate diet; people’s poor interest in using available sports and recreational facilities; and the need to improve the performance of Qatari sportsmen and sportswomen in regional and international tournaments. Three developmental outcomes were identified to address these

challenges: greater community participation in sports and physical activity, improved and integrated planning for community and elite sports facilities, and advance sports towards excellence.⁹⁸

2. Progress towards the outcomes and targets of the first culture and sport strategies (2011-2016)

The achievements of the culture sector include several initiatives: establishing a number of cultural buildings and facilities; the Qatar Museums Authority (QMA) put in place an ambitious ten-year plan to build several museums until the end of 2023; opening the Qatar National Library; launching the Msheireb Downtown Doha Project; and establishing a number of cultural centers such as Souq Waqif and Al Fanar Center, as well as specialized art galleries, like Souq Waqif Art Center, Al Markhiya Gallery, Al-Hawsh Qatar Art Gallery, Al Ruwaq Gallery, and the Virginia Commonwealth University Gallery. The inauguration of the Cultural Village Foundation (Katara) was a major cultural landmark since Katara is one of the most prominent institutions established. There was a great growth in the cultural events and activities of art galleries, as well as in lectures, conferences, concerts, festivals, theater performances, operas and art workshops.

A significant cultural achievement was designating the city of Al-Zubarah as a UNESCO World Heritage Site in 2013. Also, museums were created with outstanding international designs, such as the Islamic Museum, the Arab Museum of Modern Art, the Islamic Art Library and the Islamic Art Museum Park. The QMA launched a tourism program to enable citizens, residents and even transit passengers to explore Qatar through guided tours, in addition to implementing “My Language” program with European partners to establish virtual libraries and publish cultural and historical books in Arabic and English in partnership with the Bloomsbury Publishing in 2012. In the same year, the QMA introduced the “Google Art” project to Qatar and introduced over 30,000 artworks, including the artworks of the Islamic Art Museum and the Arab Museum of Modern Art. It also signed an agreement with the Polish National Library in 2012 to publish a full collection written in 1800 by Vatslav Sivrin Zovski about Arabian horses and their breed.

Moreover, institutions have been set up to help society interact with the expatriate cultural tide while preserving its identity and culture, such as the Wijdan Cultural Center that aims to maintain, disseminate and consolidate the cultural values of society; conduct studies and research on values; and develop programs to support social values. This is in addition to the establishment of the Nomas Center that aims to consolidate and support the key factors of national identity and establish them among the youth as an essential element of cultural identity.

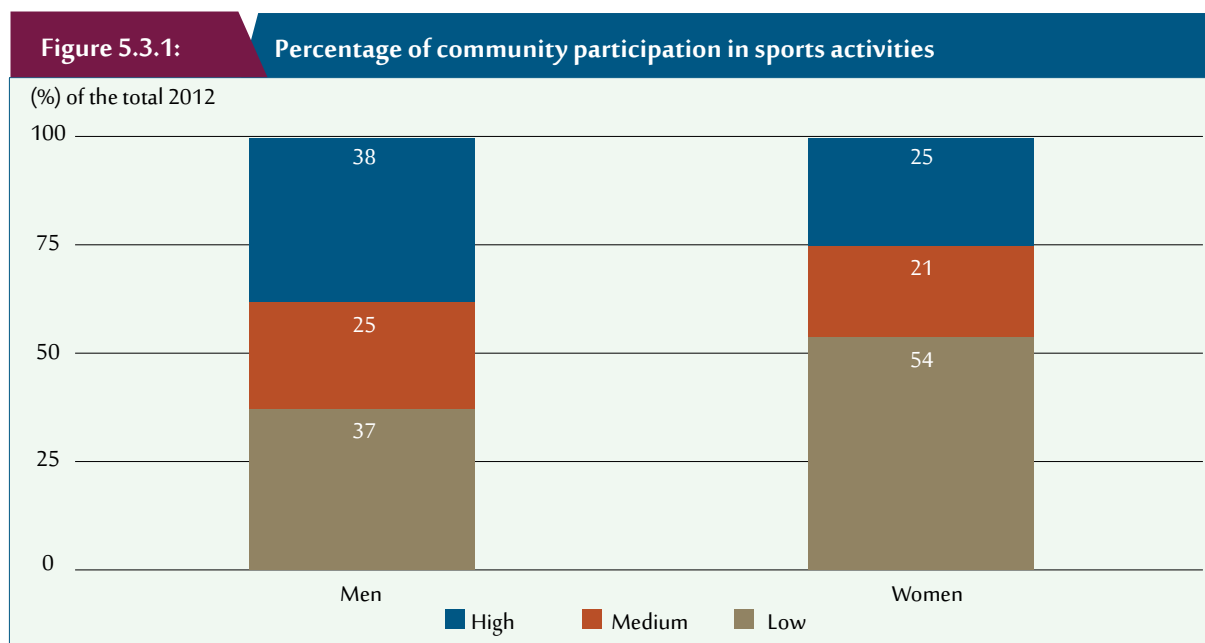
Furthermore, the Qatar Heritage and Identity Center undertook many activities contributing to Qatar’s heritage output. The QMA maintained and managed the intangible heritage. It implemented the Oral History Program as part of the National Museum of Qatar project to collect memoirs of people who influenced and participated in the history of Qatar through recorded interviews. The MOCS managed to have falconry, Arabic coffee and Majlis (cultural and social space for community members) included on the UNESCO international Cultural Heritage List. Several exhibitions on Qatari culture were organized in a number of European countries to introduce the country and its cultural heritage. Also, a number of cultural festivals and events related to national and other occasions were organized, such as theater performances by local and visiting groups; musical programs by the Qatar Music Academy; Darb Al Sai events; and the activities of Al Shaqab Equestrian Center, College of Islamic Studies, Quranic Gardens, and Heritage Library; in addition to the promotion of plastic arts and the organization of external exhibitions as well as the activities of the Doha Film Institute, including the Ajyal Film Festival, the Qatari Film Festival and the Qumra Film Festival.

98 SSS 2011-2016: Mid-term review, unpublished report, 2014.

As for sports, a participation in sports survey project was implemented. At the level of sport facilities and investment, the country had great achievements in its infrastructure that made it a destination for hosting many international sporting events and allowed for the use of these facilities from time to time for multi-purpose events, like concerts and plays. MDPS statistics⁹⁹ indicate that the sports infrastructure in the country consists of 320 sports facilities. A major achievement was the hosting of the 2006 Asian Games. In 2015, Qatar hosted the World Handball Championship, the World Boxing Championship and the World Swimming Championships. Qatar also hosted the 2016 World Road Cycling Championship and many international, continental and regional championships. Awarding the 2022 World Cup to Qatar is a great achievement for sports.

Qatar also participated in 57 international events, 49 Asian events, 33 Arab events, and 38 GCC events. Concerning persons with disability (PWDs) participation in sports activities, the Qatar Paralympic Committee and the Qatar Olympic Committee (QOC) work to integrate PWDs into society through sports and encourage them to participate in national and international competitions. The 2013 Participation Survey conducted by the QOC showed that 7% of the physically active people in the country were PWDs.¹⁰⁰

As for women's participation in sports, the number of female athletes of different ages registered with different sports federations in 2015 was 1,449 or 7% of the total number of registered athletes. The number of women registered with the Women's Sports Committee was 295, which is much less than what is hoped for. Women's participation in tournaments abroad was scarce with only two participations at the international level, two at the Asian level and six at the GCC level. In terms of community participation in sports, only 52% of Qatar's population participated in general sports activities according to 2012 statistics (Figure 5.3.1).



The sports media activity, in parallel with the efforts of various sectors, was remarkably active. Qatar's sports media system has high technical capabilities where beIN SPORTS is one of the world's leading networks that covers local, regional and international tournaments and sports events. Also, Al-Kass Sports Channel provides services locally. In the field of sports

⁹⁹ Sports statistics, MDPS 2015, MOCS, QOC.

¹⁰⁰ Sports statistics, MDPS 2015, MOCS, QOC.

journalism, all dailies issue a daily sports supplement covering local, regional and international sporting events. There are also specialized sports weeklies.

Challenges faced by the first culture and sport strategies (2011-2016)

Regarding the CSS 2011-2016, there were major general and common institutional and human challenges, such as the lack of a budget allocated for project implementation and a shortage of specialized technical staff to implement technical projects and ensure their continuity, like project managers, statistical analyzers and statistical bulletin designers. There is also the lack of a clear and systematic strategy for integrating cultural policies and initiatives into the media, poor communication and coordination among the various stakeholders in the culture sector, the absence of a common vision, weak, and sometimes absent, coordination and cooperation between CSS stakeholders, and a lack of appropriate mechanisms to support cross-sector and cross-shareholder cooperation which has led to a failure to establish new strategic alliances and partnerships to drive the CSS' projects towards success. In the field of balancing the main challenges of comprehensive development in the state of Qatar, modernization and preservation of traditions are the first fundamental challenge the QNV 2030 focused on.

With regard to the Sports Sector Strategy (SSS) 2011-2016, an increasing population growth in major cities created a major challenge for the sector. Although the sector embarked on developing sports infrastructure and creating more sports and entertainment facilities, population growth put increasing pressure on these facilities and limited access to them. Furthermore, high land prices, due to heavy use for housing, business and industrial purposes, made it difficult to find new lands for the creation of sports and entertainment facilities with suitable areas near residential neighborhoods. Thus, this led to a low utilization of these facilities by all people, and the goal of increasing community participation in sports and physical activity became difficult to achieve.

3. Challenges of the culture enrichment and sports excellence sector (2018-2022)

Despite the NDS-1 achievements, the Cultural Enrichment and Sports Excellence Strategy (CSSS) identifies many challenges that need to be addressed: an obsolete legislative structure and its failure to keep pace with developments and changes at the national and international levels; an absence of policies that identify the general trends of the State in the sector based on studies with reliable information; a weak governance system – the main challenge – causing unclear specialties, which led to duplication and overlapping of roles, which in turn caused unwarranted spending of public funds; poor organizational structures with a lack of qualified and specialized staff capable of providing distinguished services to the community; inefficient use of infrastructure; weak information and cognitive infrastructure; poor community participation; and a lack of stimulating creative abilities.

In the cultural sphere, the CSSS will activate the role of culture in preserving the identity of the Qatari society and enhancing the values of citizenship under the circumstances resulting from an accelerated development process, the well-being resulting from a high level of per capita income, and the emerging new cultural concepts due to cultural interaction at the local and external levels as a result of social media and the influx of labor needed by the development path. The CSSS will also activate youth participation in public affairs by creating mechanisms to communicate with them, identify their aspirations and needs, and develop their own and collective capabilities and skills. In the sports field, the focus will be on advancing sports to the level of excellence by developing a mechanism to discover and develop national sports skills and talents and help them achieve advanced results in various competitions.

Achieving the outcomes and targets of the Culture and Sports Sector Strategy, as one of the major sectors of social development, is expected to require effective coordination with most NDS-2 sectors. For example, it is hoped that coordination with the security and public safety sector will include work on achieving the outcome of youth development, especially in programmes for the development of youth self-skills, through integrating the topics of public safety, traffic safety, and combating drugs and extremist ideas. Coordination with the international cooperation sector includes working to benefit from Qatar's membership in the United Nations and relevant regional and international organizations/institutions. There will also be coordination with the Economic Diversification and Private Sector Development (EDPSD) to take advantage of the expertise and capacity available to them to reach the goals required in order to explore the ability of the Culture and Sports Sector to contribute to the diversification of the economic base and sources of national income.

Achieving the sectoral outcomes of the CSSS requires continuous and effective coordination with many NDS-2 sector strategies. Therefore, it is necessary to coordinate and communicate with the leader of each sector to agree on the mechanisms necessary to implement these strategies as it is hoped for.

4. Main outcome, intermediate outcomes and targets of the culture enrichment and sports excellence sector (2018-2022)

The CSSS 2018-2022 identifies a comprehensive main outcome that will help determine the sector's medium-term trends emanating from the QNV 2030 and identify the intermediate outcomes that should be achieved to reach the outcome, lead to desired positive changes in this important sector, and activate their contributions in the carrying out of the sector's mission. To achieve the main outcome, eight intermediate outcomes have been identified: activate sector governance, attain a high level of cultural and sport community participation, discover and develop cultural and sports talents, enhance regional and international cooperation, activate investment potential in the sector, use culture as a framework to maintain identity and promote citizenship, qualify young people to play an active role in society, and sports of a distinguished level. Moreover, 28 targets and eight key programmes that include 53 projects have been identified to achieve the expected outcomes.

Main outcome

“An active and creative cultural, sports and youth system that supports society advancement while preserving its constants and values”

A review of the status quo of the Culture Enrichment and Sports Excellence Sector shows a set of challenges shared by the three pillars (culture, youth and sports), foremost among which is a need for a governance system to enhance performance efficiency and effectiveness in the sector in order to fulfill its mission aimed at supporting society in preserving its cultural heritage and values derived from Islam and its deep-rooted and rich history through synergy and integration of efforts of all the actors in the sector.

This clearly shows that there is a need to join efforts to achieve the mission of the sector under an institutional framework of harmony and fruitful cooperation that is formed in an active and excellent cultural, sportive and youth system able to positively influence and support society in its accelerated development process towards advancement and prosperity, while maintaining its constants and values. The system is defined as a multi-component set that works in harmony and whose basic elements are the institutional structures of actors, including their staff, the regulatory frameworks that regulate and direct work, and the databases and information systems that help monitor developments and changes. This system is active, has a significant impact on the target groups, and is creative and innovative in interacting with different challenges.

Intermediate Outcomes

Intermediate outcome 1: Effective cross-sector governance

The sector strategy (2018-2022) will work to modernize the legislative structure and ensure that it keeps abreast of the national and international developments and changes, including the development of policies that identify the general orientations of the State in the three fields of the sector, which should be based on studies with reliable data and information. It will also provide all means to ensure effective governance. A sectoral knowledge structure will be established based on reliable databases that will allow for monitoring rapid developments and changes and help make decisions. It supports the building of a database for different cultural industries and the provision of required statistics, especially on the number, distribution and participation of talents in internal and external activities. A framework will also be developed to help activate partnerships of all kinds among all institutions active in the Culture Enrichment And Sports Excellence Sector.

- **Target 1:** Comprehensively review legislation, develop sectoral policies, update them to conform to developments and changes, and introduce what is required by the end of 2020
- **Target 2:** Develop a five-year plan to support sports in mid-2018
- **Target 3:** Develop a framework to strengthen and activate partnerships among the effective institutions in the sector and start implementing it by the end of 2018
- **Target 4:** Establish a sectoral knowledge structure based on reliable and comprehensive data, information and studies that monitor developments and changes and help interact with them by the end of 2020

Intermediate outcome 2: A high level of community cultural and sport participation

The sector strategy will promote community participation in cultural and sports affairs, motivate youth and enhance their participation in public affairs, provide statistical data and information that show progress made and what is required for the next phases, conduct in-depth studies that help identify the factors leading to poor community participation, and then address such factors in order to achieve a satisfactory increase in community cultural and sport participation by the end of the Strategy's period. A plan will be prepared to modernize sports, cultural and youth establishments and facilities to become more attractive to the public, in addition to launching annual educational and awareness packages to motivate the public to participate in cultural and sports activities and events.

- **Target 1:** Conduct an in-depth analysis to identify the factors leading to a weak cultural and sport participation of community in mid-2019
- **Target 2:** Develop a Community Sport Participation Strategy to encourage the participation of all segments and components of the society and start implementing it in mid-2019
- **Target 3:** Develop a plan to modernize sports, cultural and youth establishments and facilities to be more attractive to the public and start implementing it by the end of 2020
- **Target 4:** Launch annual educational and awareness packages to motivate the public to participate in cultural and sports activities and events until the end of 2022

Intermediate outcome 3: National cultural and sporting talents

The fourth sectoral outcome in the CSS 2011-2016 reflected a desire to increase high quality talents. However, this desire faced several challenges, most notably a failure to establish a system to help identify talented and creative people and help them determine their paths towards developing their talents and creations. Therefore, the Culture Enrichment and Sports Excellence Strategy will achieve this outcome through developing and establishing a national system that includes clear and specific mechanisms to discover talented and creative people in the cultural and sports fields and creating a favorable environment to motivate creativity and sponsor talents, and then developing and implementing programmes to refine and develop creative skills and talents, especially for the younger age groups and youth.

- **Target 1:** Develop and implement an applied framework for a national system that helps discover and nurture national creative talents and adopt it by the end of 2019
- **Target 2:** Implement programs to sponsor creative talents discovered until the end of 2022

Intermediate outcome 4: Regional and international cooperation and communication reflecting the civilized image of the country

The Culture Enrichment and Sports Excellence Strategy has identified this outcome as one of the intermediate outcomes needed to achieve the main sectoral outcome. In particular there will be coordination with the International Technical Cooperation Sector to make use of Qatar's membership in the UN and in relevant regional and international organizations. Qatar has worked to be an active and influential member of the international community and to achieve the highest possible rankings in international indicators, relying on its huge investment in human and community development in the past decades. Qatar has acceded to various regional and international organizations. It has also maintained friendly relations with various countries around the world.

The Culture Enrichment and Sports Excellence Strategy will maximize the benefits of all bilateral and regional agreements and optimize their implementation. In addition, a plan will be developed and implemented to benefit from Qatar's membership in UN agencies and regional and international organizations. A plan will also be developed and implemented to ensure a continued representation of Qatar in leadership positions in regional and international organizations in the areas of this sector.

- **Target 1:** Develop and activate mechanisms of international technical cooperation related to the sector to maximize the benefit for the country by the end of 2020
- **Target 2:** Develop and implement a plan to make use of Qatar's membership in UN agencies and regional and international organizations in mid-2018
- **Target 3:** Develop and implement a plan to ensure Qatar's presence in the leadership positions of regional and international cultural, sports and youth bodies in mid-2018
- **Target 4:** Develop and implement a framework to ensure coordination and quality of external participations that reflect Qatar's civilized image by the end of 2018

Intermediate outcome 5: Culture and sports as two sources of national income

Despite the huge investment made by the State in the areas of cultural and sports infrastructure, the challenge remains for cultural and sports institutions to play their expected role in benefiting from these achievements in diversifying the country's

income sources. There is also economic potential in the Culture and Sports Sector that is yet to be discovered. Therefore, the Culture Enrichment and Sports Excellence Strategy will conduct the necessary research and studies to identify the elements of the economic latent and manifest potentials of the sector and how to invest them in order to achieve the desired economic return and diversify the country's income sources, especially with regard to determining the investment opportunities for the sports facilities of the FIFA World Cup 2022. The Sectoral Strategy will also explore the sector's ability to contribute to the diversification of the economic base and national income sources, in addition to activating the role of the private sector. It will further coordinate with the sector of Economic Diversification and Private Sector Development to benefit from the available technical expertise and capabilities to achieve the desired targets.

- **Target 1:** Conduct a study to determine the economic potential of the sector and how to invest it to diversify the sources of national income by the end of 2019
- **Target 2:** Develop and activate a strategic partnership framework with the private sector based on the economic potential of the Culture Enrichment and Sports Excellence Sector by the end of 2019
- **Target 3:** Conduct a study to determine the investment opportunities for the sports facilities of the FIFA World Cup 2022 by the end of 2018

Intermediate outcome 6: Culture as a framework to maintain identity and promote citizenship and civilized communication

As a result of the accelerated development and the accompanying demographic and structural changes, Qatari society is experiencing a range of cultural and social changes that require monitoring and continuous study in order to achieve the desired benefits in terms of development and prosperity while preventing any threats to its identity and culture and value heritage. Therefore, the Culture Enrichment and Sports Excellence Strategy will address this challenge by supporting a distinctive cultural production capable of enriching society and achieving a positive impact, with a particular focus on the youth. It will also develop and implement creative cultural programmes and events that promote citizenship and Qatari values and protect the Qatari heritage. Moreover, the CSSS will promote reading and exploration at the community level, especially among children and young people.

- **Target 1:** Develop and implement mechanisms to support excellent national cultural production in mid-2019
- **Target 2:** Develop and implement attractive cultural programme to promote citizenship and Qatari values and support civilized communication by the end of 2022
- **Target 3:** Develop and implement a plan to promote knowledge of and interact with expatriates' cultures by the end of 2022
- **Target 4:** prepare and implement the necessary mechanisms to protect and develop Qatari cultural heritage by the end of 2022
- **Target 5:** Develop and implement mechanisms that encourage reading and exploration by the end of 2019

Intermediate outcome 7: Empowered and qualified youth for an active role in society

The CSSS will work on the development of young people and their skills with a view to activating their role and contributions to society through constant communication using various media, identifying their needs and aspirations and working to achieve

them through many programs and events. The CSSS will also create effective channels aiming to communicate young people's voice to decision-makers at all levels in order to continually identify and work towards meeting their needs and aspirations.

- **Target 1:** Set up and implement mechanisms to develop the knowledge, skills and experience of young people to activate their role in society by the end of 2019
- **Target 2:** Develop mechanisms to enhance the voice of young people and identify their needs and aspirations by mid-2020
- **Target 3:** Implement initiatives and programmes to support meeting the youth needs and aspirations by the end of 2022

Intermediate outcome 8: High-level sport

The SSS 2011-2016 sought to increase and improve the process of building and managing sports talents through setting up a model to build athletes in certain sports. This model aims to set a path that starts with discovering talents until they reach a level of excellence. A set of manuals were developed in this regard. To that end, the Culture Enrichment and Sports Excellence Strategy will develop an integrated plan to advance sports to excellence, nurture talents, develop different sports elites and create distinctive sports cadres. In addition, the CSSS will develop sports and physical activity science and sports medicine and promote the sports track in general.

- **Target 1:** Draw the National Integrated Sport Development Plan in the State by mid-2020
- **Target 2:** Increase the number of Qatari athletes of different age groups who are enrolled in sports federations in 2016 by a cumulative rate of 10% annually till the end of 2022
- **Target 3:** Increase the number of Qatari technical and managerial sports cadres by at least 5% starting in 2016 till the end of 2022

5. Conclusion

Achieving the desired sectoral outcomes of the Strategy requires continuous and effective coordination with many NDS-2 sectors. Accordingly, it is necessary to coordinate and communicate with the leading agency of each sector to agree on the mechanisms necessary to implement these strategies as it is hoped for. Therefore, it is hoped that coordination, with the Security and Public Safety Sector, will include work on achieving the outcome of youth development, especially in programmes related to the development of youth self-skills, in order to integrate the topics of public safety, traffic safety, and combating drugs and extremist ideas. Concerning the Technical Cooperation Sector Strategy, the Cultural Enrichment and Sport Excellence Strategy (CESES) identifies enhancing regional and international cooperation and communication to reflect the civilized image of the country as one of the intermediate outcomes needed to achieve the main outcome. There will particularly be coordination with the International Technical Cooperation Sector to benefit from Qatar's membership in the UN and in relevant regional and international organizations. Regarding EDPSD, The CESES will explore the sector's ability to contribute to the diversification of the economic base and national income sources, in addition to activating the role of the private sector. It will further coordinate with the Sector of Economic Diversification And Private Sector Development to benefit from the technical expertise and available capabilities to achieve the desired goals.

Given the challenges mentioned in this Strategy, a range of social challenges affecting young people have been addressed, especially with regard to family security and safety. It is therefore necessary to coordinate with the Social Protection Sector to implement programmes related to the development of young people's life skills to achieve successful youth development. Coordination with the Education And Training Sector is also imperative in order to achieve the sectoral outcome of activating the role of culture in preserving identity and promoting the values of citizenship through including subjects on the Qatari cultural heritage in the curricula, as well as programmes for youth skills development and for raising awareness of the positive benefits of vocational education. Also, during the development of this strategy, we noted health challenges requiring urgent intervention to prevent the spread of chronic non-communicable diseases in society in general and among the youth in particular. Thus, several joint interventions between the Culture and Sports Sector and the Healthcare Sector have been identified in the CESES and will be implemented during the Strategy's period.

6. Annex

Intermediate outcomes, targets, projects, and implementing and supporting agencies that contribute to the main outcome of “An active and creative cultural, sports and youth system that supports society advancement while preserving its constants and values

Intermediate outcomes	Targets	Programmes / Projects	Implementing agencies	Support agencies
<p>Intermediate outcome 1: Effective cross-sector governance</p>	<p>1.1 Comprehensively review legislation, develop sectoral policies, update them to conform to developments and changes, and introduce what is required by the end of 2020</p> <p>1.2 Develop a five-year plan to support sports in mid-2018</p> <p>1.3 Develop a framework to strengthen and activate partnerships among the effective institutions in the sector and start implementing it by the end of 2018</p> <p>1.4 Establish a sectoral knowledge structure based on reliable and comprehensive data, information and studies that monitor developments and changes and help interact with them by the end of 2020</p>	<p>Effective governance in the culture and sports sector</p>	<p>MOCS</p>	<p>Partners, ministries and stakeholders</p>
<p>Intermediate outcome 2: A high level of community cultural and sport participation</p>	<p>2.1 Conduct an in-depth analysis to identify the factors leading to a weak cultural and sport participation of community in mid-2019</p> <p>2.2 Develop a Community Sport Participation Strategy to encourage the participation of all segments and components of the society and start implementing it in mid-2019</p> <p>2.3 Develop a plan to modernize sports, cultural and youth establishments and facilities to be more attractive to the public and start implementing it by the end of 2020</p> <p>2.4 Launch annual educational and awareness packages to motivate the public to participate in cultural and sports activities and events until the end of 2022</p>	<p>Enhance community participation in culture and sports</p>	<p>MOCS</p>	<p>QOC Qatar Media Foundation QF</p>

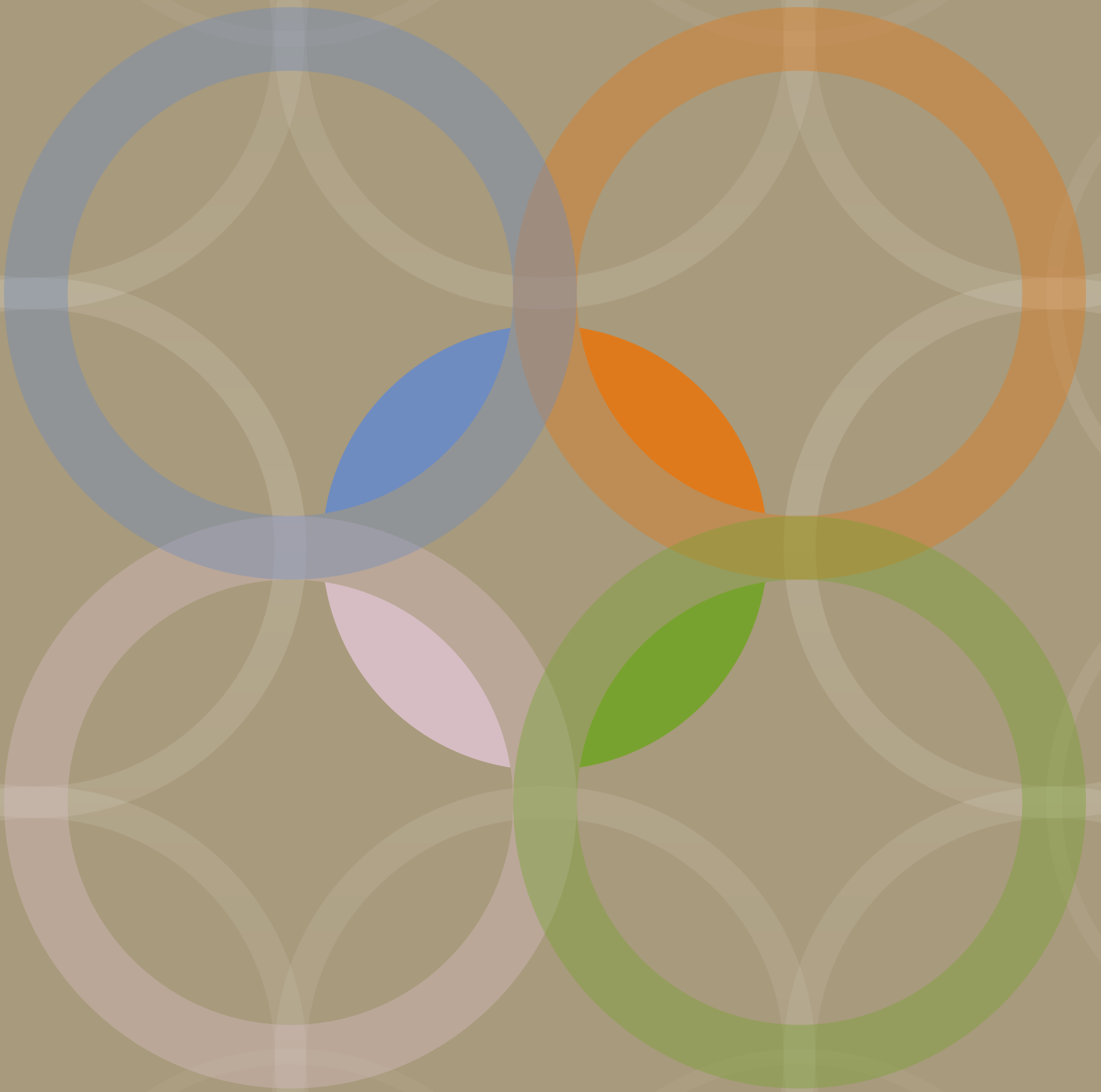
Intermediate outcomes	Targets	Programmes / Projects	Implementing agencies	Support agencies
Intermediate outcome 3: National cultural and sporting talents	<p>3.1 Develop and implement an applied framework for a national system that helps discover and nurture national creative talents and adopt it by the end of 2019</p> <p>3.2 Implement programs to sponsor creative talents discovered until the end of 2022</p>	Stimulate creativity and care for talents	MOCS	QMA
Intermediate outcome 4: Regional and international cooperation and communication reflecting the civilized image of the country	<p>4.1 Develop and activate mechanisms of international technical cooperation related to the sector to maximize the benefit for the country by the end of 2020</p> <p>4.2 Develop and implement a plan to make use of Qatar's membership in UN agencies and regional and international organizations in mid-2018</p> <p>4.3 Develop and implement a plan to ensure Qatar's presence in the leadership positions of regional and international cultural, sports and youth bodies in mid-2018</p> <p>4.4 Develop and implement a framework to ensure coordination and quality of external participations that reflect Qatar's civilized image by the end of 2018</p>	Strengthen regional and international cooperation and communication in the areas of culture, sports and youth	MOCS	QMA MOFA
Intermediate outcome 5: Culture and sports as two sources of national income	<p>5.1 Conduct a study to determine the economic potential of the sector and how to invest it to diversify the sources of national income by the end of 2019</p> <p>5.2 Develop and activate a strategic partnership framework with the private sector based on the economic potential of the Culture Enrichment and Sports Excellence Sector by the end of 2019</p> <p>5.3 Conduct a study to determine the investment opportunities for the sports facilities of the FIFA World Cup 2022 by the end of 2018</p>	Activate the economic potential of the cultural and sports sector	MOCS	MECT Qatar Chamber

Intermediate outcomes	Targets	Programmes / Projects	Implementing agencies	Support agencies
<p>Intermediate outcome 6: Culture as a framework to maintain identity and promote citizenship and civilized communication</p>	<p>6.1 Develop and implement mechanisms to support excellent national cultural production in mid-2019</p> <p>6.2 Develop and implement attractive cultural programme to promote citizenship and Qatari values and support civilized communication by the end of 2022</p> <p>6.3 Develop and implement a plan to promote knowledge of and interact with expatriates' cultures by the end of 2022</p> <p>6.4 prepare and implement the necessary mechanisms to protect and develop Qatari cultural heritage by the end of 2022</p> <p>6.5 Develop and implement mechanisms that encourage reading and exploration by the end of 2019</p>	<p>The culture program is based on the preservation of identity and promotion of citizenship and cultural communication</p>	<p>MOCS</p>	<p>QMA MEHE MOEIA</p>
<p>Intermediate outcome 7: Empowered and qualified youth for an active role in society</p>	<p>7.1 Set up and implement mechanisms to develop the knowledge, skills and experience of young people to activate their role in society by the end of 2019</p> <p>7.2 Develop mechanisms to enhance the voice of young people and identify their needs and aspirations by mid-2020</p> <p>7.3 Implement initiatives and programmes to support meeting the youth needs and aspirations by the end of 2022</p>	<p>Youth Development and Empowerment program</p>	<p>MOCS</p>	<p>Center for Social Development (Nama) QOC MOPH</p>
<p>Intermediate outcome 8: High-level sport</p>	<p>8.1 Draw the National Integrated Sport Development Plan in the State by mid-2020</p> <p>8.2 Increase the number of Qatari athletes of different age groups who are enrolled in sports federations in 2016 by a cumulative rate of 10% annually till the end of 2022</p> <p>8.3 Increase the number of Qatari technical and managerial sports cadres by at least 5% starting in 2016 till the end of 2022</p>	<p>National Programme for the Advancement of Sport to Excellence</p>	<p>MOCS</p>	<p>QOC</p>

Part V: Sound Social Development



Chapter IV: Global Partnerships for Development (International Cooperation)



1. Introduction

The QNV 2030 considers international cooperation an integral part of national development process. The vision identified the most important goals in the field of international cooperation, namely, enhancing the regional and global role of the State of Qatar economically, politically and culturally, especially within the framework of the United Nations system and regional and international organizations; strengthen the cultural exchange with the Arab countries and peoples in particular and with other countries in general; foster and support the dialogue among civilizations; promote coexistence between different religions and cultures and contributing to the establishment of international peace and security through political initiatives and humanitarian assistance. At this level, the development assistance goals of QNV 2030 are in line with Articles 6 and 7 of Qatar's Permanent Constitution which stipulate: "The State shall respect international charters and conventions, and shall strive to implement all international agreements, charters, and conventions it is a party thereof"¹⁰¹ and "The foreign policy of the State is based on the principles of strengthening international peace and security by means of encouraging peaceful resolution of international disputes, and shall support the right of all peoples to self-determination; and shall not interfere in the domestic affairs of states; and shall cooperate with peace-loving countries"¹⁰². These goals are also consistent with international cooperation and development goals.

The QNV 2030 goals in the area of international cooperation emphasized the importance of "An increased regional role economically, politically and culturally, particularly within the framework of the Gulf Cooperation Council, the Arab League and the Organization of Islamic Conference and the UN System and its affiliate entities; strengthen the cultural exchange with the Arab peoples in particular and with other nations in general; foster and support the dialogue among civilizations, promoting coexistence between different religions and cultures; and contribution towards international peace and security through political initiatives and developmental and humanitarian assistance."¹⁰³

These objectives are consistent with SDG 17: "Strengthen the means of implementing and revitalize the global partnership for sustainable development." This includes mobilizing financial resources; capacity building; enhancing policy coherence for sustainable development; enhancing the global partnership for sustainable development, complemented by multi-stakeholder partnerships that mobilize and share knowledge, expertise, technology and financial resources, in order to support the achievement of the Sustainable Development Goals in all countries, in particular developing countries; and encouraging and promoting effective public, public-private and civil society partnerships, benefiting from the expertise and resourcing strategies of partnerships.

Undoubtedly, development cooperation strengthens regional and international ties and economic, social and cultural relations between countries and societies alike. At the same time, Qatar's development cooperation can contribute to strengthening its institutional capacities along with the capacities of many of Qataris working in this area and provide the government and civil society with sustainable information on UN agencies and regional organizations with a view to making use of them in many technical and advisory areas.

Qatar's International Cooperation Strategy (ICS) supports the special goal of a greater economic and social development in low-income countries (LICs). It is in line with the 2030 SDGs as adopted by world leaders in September 2015, which supports

¹⁰¹ Article 6 of Qatar's Permanent Constitution.

¹⁰² Article 7 of Qatar's Permanent Constitution.

¹⁰³ QNV 2030.

global partnership for poverty eradication, reducing inequality and promoting sustainability. The Ministerial Declaration of the High-Level Political Forum on Sustainable Development – held in New York over July 2-11, 2016, under the auspices of the UN Economic and Social Council –stresses that “no one should be left behind.”

The scale and ambition of the 2030 Agenda require the activation and strengthening of a global partnership for sustainable development to ensure plan implementation and acting in a spirit of global solidarity, especially with the poorest and most vulnerable. We are fully committed to this, moving from the declaration to achieving results, and working with all stakeholders. Providing means of implementation, in particular as set out in SDG 17 and in each SDG, and supporting them with the tangible policies and measures of the Addis Ababa Action Agenda of the 3rd International Conference on Financing for Development, which is an integral part of the 2030 plan, is critical to achieving our ambitious goals¹⁰⁴

International cooperation plays a vital role in addressing global issues. Many issues, like environment, war, diseases and poverty, require a great deal of effort from several countries. In fact, this is because almost all countries face the same issues. International cooperation is a key instrument of foreign policy given its development component in accordance with SDG 17 “Global Partnership for Development” where it supports countries to implement the international development goals.

2. Current situation analysis

International cooperation at the national level plays a pivotal role in, inter alia, strengthening international cooperation aimed at establishing and strengthening the capacities of national institutions, which will have a long-term impact on improving the implementation of international conventions and other resolutions of UN agencies and regional organizations in the social, economic, environmental and security fields; modernizing statistical systems; providing the indicators needed to measure progress towards national and international development goals, human rights issues, transparency and the fight against corruption; providing international expertise, technical cooperation and best practices to ministries and government departments with a view to developing institutional structures; partnering with international organizations such as the UN, the World Bank, the International Monetary Fund; specialized international agencies and UN agencies such as the Economic and Social Council, United Nations Development Programme (UNDP), the United Nations Population Fund, the United Nations Conference on Trade and Development (UNCTAD), the International Labour Organization (ILO), UNESCO; regional agencies and committees such as the Economic and Social Commission for Western Asia (ESCWA), Economic and Social Council and its Statistics and Population divisions, Security Council, the General Assembly, and the Office of the High Commissioner for Human Rights, the Partnership in Statistics for Development in the 21st century (PARIS21), the Statistical, Economic and Social Research and Training Centre for Islamic Countries (SESRIC), the Arab Planning Institute, the Arab Institute for Training and Research in Statistics.

The aim of such partnerships is for these bodies to play a catalytic role in national development and in the implementation of the NDS-2 (2018-2022) targets, and to enable them to implement their projects in a timely and professional manner.

International cooperation also contributes to international and regional partnerships on energy, water and environmental protection issues; capacity-building, training and qualifying Qatari human resources to make a creative contribution to the development process; and to provide technical and logistical support to international NGOs and CSOs in order to assume an important position and play an advanced role in helping the public and private sectors achieve their strategic objectives.

¹⁰⁴ <https://www.un.org/ecosoc/ar/events/2016-1>.

It also helps develop academic and research partnerships with many global universities and research centers on computing, energy, environment, biomedical and social research, IT, and humanities; provide material, technical and moral support to State researchers; and provide scholarships to many students from Arab and Islamic countries, low income countries (LICs) and conflict-affected countries.

The NDS-2 (2018-2022) gives Qatar an opportunity to strategically highlight its very important contribution to the Global Partnership For Development, including humanitarian aid and substantial spending on development assistance. Qatar's International Cooperation Strategy (ICS) supports the implementation of the goal of a greater economic and social development in LICs; is consistent with the above-mentioned 2030 SDGs; supports a global partnership for development to eradicate poverty, reduce inequality, and promote economic development and environmental sustainability; and welcomes the contribution of all stakeholders, including the private sector, NGOs, charities, academia, research centers and civil society in the partnership envisaged to implement the decisions of international and regional conferences and UN summits on economic, social, environmental and related fields, particularly in the achievement of the internationally agreed development goals and for mutual benefit. The QNV 2030 states: "As a responsible member of the international community, Qatar will contribute to attaining international peace and security through political initiatives and developmental and humanitarian assistance."

Qatar's effective participation in technical cooperation in the development and humanitarian fields and the identification of the thematic areas that need to be focused on and priority countries help create socially just societies that are less likely to engage in armed conflict. It should be noted here that Qatar is also very much interested in SDGs 11 and 16 on safe, integrated and peaceful societies.

Qatar's development and relief efforts

In line with the lofty goals and objectives of the permanent Constitution and the QNV 2030, the State has taken care to spread education for all to build generations conscious and aware of the culture of peace and the means for people to benefit from science and technology.

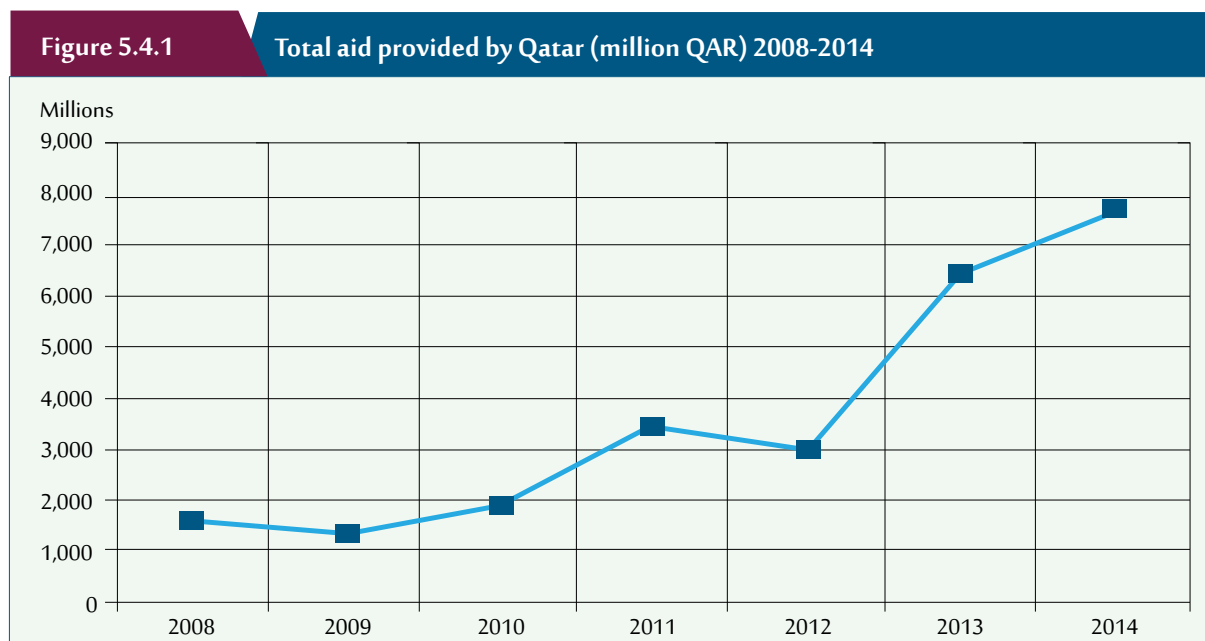
The State encourages and supports talented and distinguished foreign students from least developed countries (LDCs) to study at the University of Qatar, the Doha Institute of Higher Studies, Hamad University and the Education City's universities. This will help build long-term relationships between Qatar and the students' countries of origin, in addition to building the human capacities of these students. Moreover, the diversification of cultures on campus will help refine students' talents to become future leaders, decision makers and leaders of public opinion in many areas, including the government, politics, business, civil society and others. Sponsoring distinguished international students also promotes national development by leveraging these capacities in Qatar's labour market. The MOFA leads the policy of international cooperation and its pillars, including the external development policy. It coordinates links with several governmental and non-governmental organizations.

The State is keen to constantly promote dialogue using soft power diplomacy initiatives in regional and international affairs. In its international relations, Qatar focuses on promoting peace and stability. This strategy is based on maintaining good relations with neighbouring countries, forging strategic alliances with major powers and regional and international bodies, and advancing Qatar's image internationally. At this level, Doha hosted the Center for Conflict and Humanitarian Action Studies, the first of its kind in the Arab region, as an academic edifice capable of generating distinctive knowledge and mainstreaming best practices in conflict management and humanitarian action that would inform decision and policy makers in the Middle East and North Africa to take appropriate decisions that respond to the conflicts in their countries. The Center also provides higher education opportunities for humanitarian affairs researchers and workers. Qatar has set up a National Committee for the Alliance of Civilizations in line with SDGs 11 and 16 on safe, peaceful and integrated societies.

Helping LDCs achieve the internationally agreed development goals is a major goal of several initiatives under Qatar's International Cooperation Strategy. Reducing poverty, creating jobs in infrastructure projects, and providing education and health are of the main areas of focus of the this program. Accordingly, the Qatar Foundation for Education, Science and Community Development (QF) has launched and implemented the Silatech initiative to support the aspirations of Arab and global youth of having access to decent work, in addition to the "Education above All Foundation" that provides educational opportunities, especially for children living in low-income families or facing humanitarian crises. The said initiative includes a wide range of national, regional and international partners to promote and guarantee the right of all children to education. Qatar has also established the Qatar Social Work Foundation (QSW) that brings together seven Qatari centers specializing in the promotion of social development.

In this context, the Doha Institute for Graduate Studies has developed the Economic Development College and Programme to graduate cadres capable of leading and strengthening international development institutions and programmes in Qatar. Qatar is one of the high-income developing countries of the South and is not a developed industrial country that has to meet the Official Development Assistance (ODA) of 0.7% of the gross national income (GNI), but it is actively involved in achieving SDG 17: Global Partnership for Development.

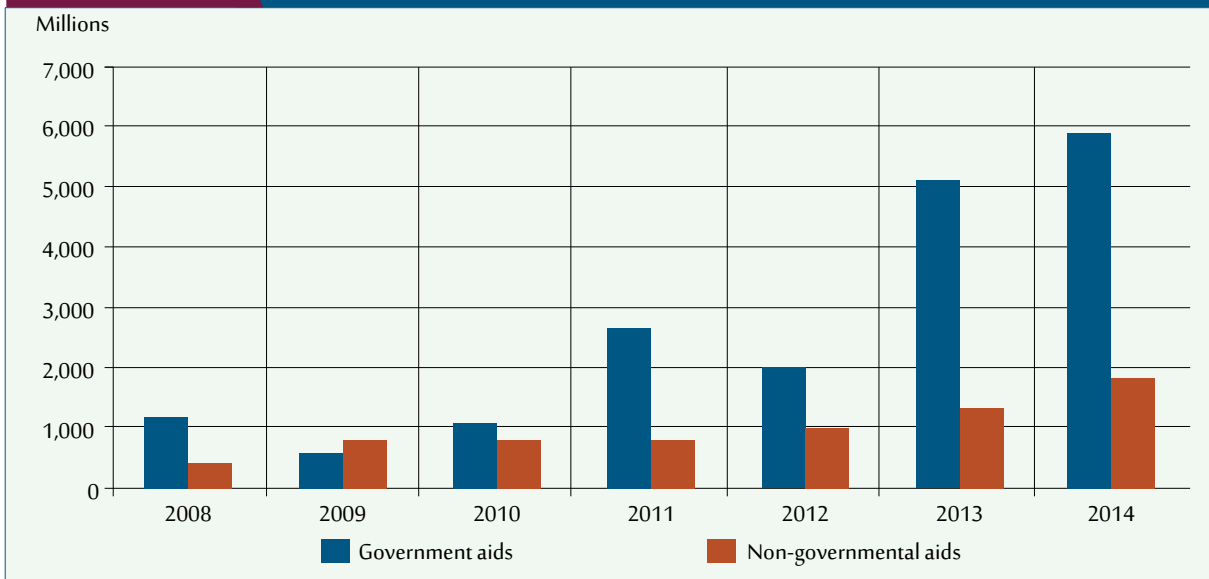
Qatar voluntarily provides developing countries, especially LDCs, with development aid to help them achieve the above-mentioned Goal and previously the Millennium Development Goals (MDGs). It should be however noted that this international commitment rests with the developed countries of the North to fully fulfill their commitment of Official Development Assistance, where many of them have committed to allocate 0.7% of their GNI to the ODA offered to developing countries and allocating 0.15 to 0.20 percent of their GNI to the ODA for LDCs. ODA providers are encouraged to consider the possibility of setting a target of allocating at least 0.20 % of Gross National Product (GNP) for ODA to least developed countries. The value of total voluntary government and non-government development aid provided by Qatar increased from nearly QAR 1.6 billion in 2008 to about QAR 7.7 billion in 2014, i.e. an increase of 381% (Figure 5.4.1).



Source: MDPS, MDG Report, 2015

Of the total value of voluntary development aid provided by Qatar in 2014, government aid accounted for 76%, while NGOs aid was 24% (Figure 5.4.2).

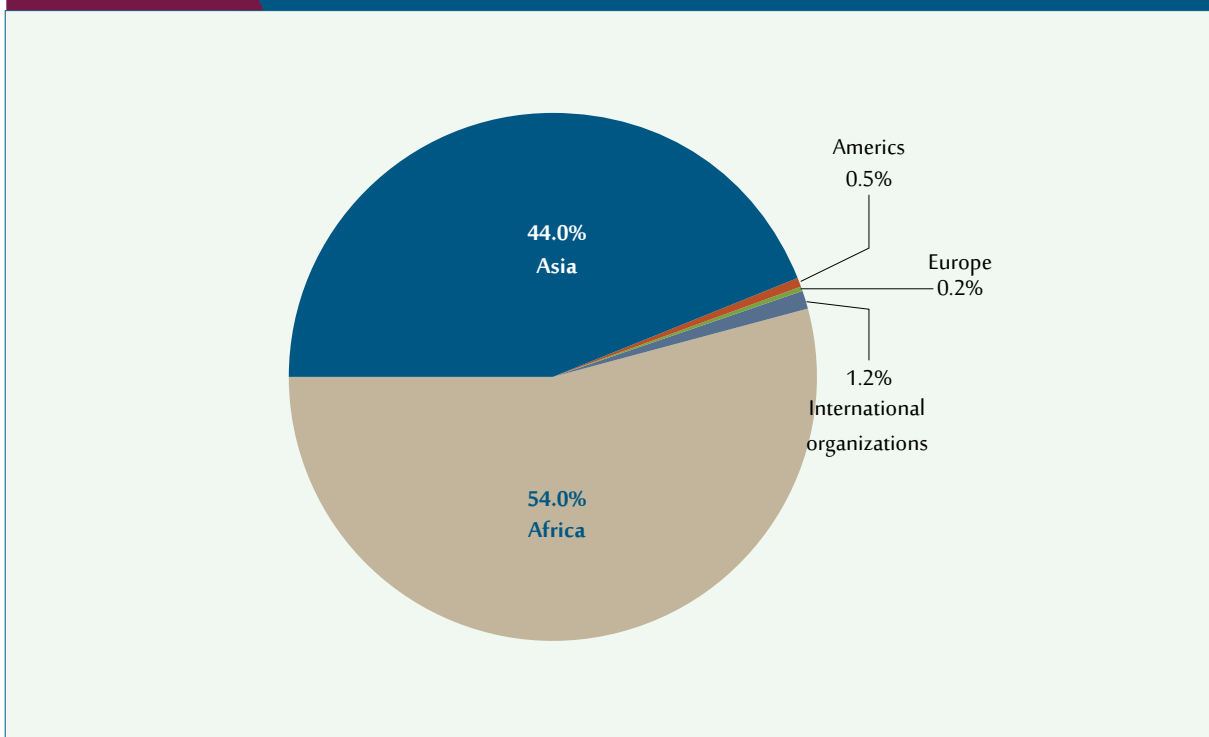
Figure 5.4.2 Total government and non-government aid provided by Qatar (million QAR) 2008-2014



Source: MDPS, MDGs Report, 2015

Data indicate that most of Qatar’s government aid in 2014 (54%) was to African countries then to Asian countries (44%) and international organizations (1.2%). The share of European and American countries was 0.7% (Figure 5.4.3). The ODA provided by Qatar in 2014 amounted to 0.78% of its GDP, an increase of 87% compared to 2008. This increase exceeds that of Qatar’s counterparts in the Development Aid Committee (DAC) countries of 0.30% of their GDP¹⁰⁵.

Figure 5.4.3 Government aid provided by Qatar by continent, 2014



Source: MDPS, Diplomatic Institute, MDGs Report, 2015

105. Qatar’s MDGs Report, 2015.

3. Sectoral challenges and required response

The international cooperation sector faces many challenges, notably a limited coordination of international cooperation initiatives among ministries, government institutions, the private sector and CSOs, in line with the MOFA development policy. There is also a limited benefit from the opportunities provided by UN agencies and regional and international organizations for partnership, participation in high-level positions, training, knowledge and technical fellowships; poor activation of an interactive information system on partnerships that provides information on opportunities for institutional and human capacity development at the national level; and a limited use of State diplomatic missions to promote development projects and the State development and humanitarian aid opportunities.

In addition, there is currently no effective mechanism in place to monitor and evaluate the implementation of initiatives with a view to identifying the successes and quality of partnership and technical cooperation. The fragility of political stability and the very weak capacities of many countries receiving humanitarian aid weaken the ability to implement sustainable humanitarian and development programmes. There is also a weak use of means of communication to promote effective and sustainable technical cooperation at the national and international levels. Moreover, the changed volume of the financial resources allocated to development aid, especially provided by the State to non-profit organizations and CSOs, weakens stakeholders' ability to plan for sustainable partnership and technical cooperation initiatives.

The ICS will adopt many initiatives to address such challenges and create a favourable environment to enable the MOFA and partners to advance action on national and international development by encouraging Qatari institutions, ministries and organizations to further cooperate with the MOFA to coordinate development initiatives and international relations in an integrated and meaningful manner in order to ensure a coherent international activity of all State sectors; raising awareness of the work and competencies of UN agencies; identifying the services available to member states by increasing the number of meetings and training courses organized by the MOFA for representatives of ministries and stakeholders; requesting that all delegates report on the conferences they attend and the actions to be taken; keeping these reports and making them available to all stakeholders to build up an institutional memory; and nominating Qatari experts to occupy posts or positions in UN organizations and its specialized agencies.

The sector will also seek to build an interactive information system that includes detailed information on the UN and its specialized agencies, international and regional organizations and their projects in order to have access to institutional and human capacity-building opportunities; set up multiple partnerships in national development projects, in particular the NDS-2 (2018-2022) and the 2030 Agenda for Sustainable Development; enhance the use of diplomatic missions to develop international interaction at the scientific, cultural, commercial and educational levels; search for effective partnerships to the best interest of people; build friendship bonds that benefit stakeholders; familiarize international communities with Qatar's development achievements and role in resolving conflicts and in establishing interaction between religions and civilizations.

It will also seek to develop a system to monitor and evaluate partnership services and international cooperation; regularly conduct administrative surveys targeted to measure customer satisfaction (Customer Satisfaction Survey); commit to performance indicators when implementing related projects; train and qualify relief workers to work under conflicts and disasters in order to provide good services in difficult circumstances to those in need; make the most of local and international media to promote the NDS-2 (2018 - 2022) in general and the ICS in particular; provide information and reports on progress in Qatar to foreign media outlets; use social media to create community interaction; and make efforts to secure adequate financial resources, whether from government resources or donations and contributions from civil society, to finance priority projects. It may also require engagement in investment projects to provide sustainable resources for Qatari humanitarian and relief work in many conflict, disaster and vulnerable areas. This is in addition to partnering with donor countries, organizations and associations.

4. Main outcome, intermediate outcomes and targets of the global partnerships for development sector (2018-2022)

In light of the challenges facing the International Cooperation Sector and the need to address them, a main outcome of this sector has been identified as “**Effective, Orderly And Sustainable International Cooperation.**”

This outcome is expected to support and coordinate development initiatives and partnerships at the national and international levels with a view to contributing effectively to international peace and security; strengthening Qatar’s role and status in international forums; coordinating Qatar’s efforts under the GCC, the Arab and Islamic countries, and the UN system; strengthening this role in the relief and humanitarian system in cooperation with relevant ministries, government departments and relevant CSOs; ensuring State stakeholders’ access to the technical cooperation provided by UN agencies and international organizations to all levels; and playing an active and effective role in resolving conflicts in the region.

Three intermediate outcomes have been identified where the MOFA Department of International Cooperation will work to achieve them in collaboration with partners to improve productivity, advance national development projects provisions and greatly improve the quality of life in the country. This outcome contributes to SDG 17 of 2030 Agenda for Sustainable Development on partnership for development¹⁰⁶. Below are the three identified intermediate outcomes.

Intermediate outcome 1: National development efforts that contribute to promoting the sector strategies alignment with international standards and protecting national gains from emerging and new threats

To achieve this outcome, the State, represented by the MOFA, will continue to fulfill its obligations of providing humanitarian aid to people suffering from war and conflict all over the world where some partners will launch fundraising campaigns for such people, in addition to strengthening the contributions of Qatari diplomacy to conflict resolution, working to stop the war machine that is claiming millions of lives in the Arab region and other regions in order to save the lives of innocent people, especially women and children, and alleviate the suffering of those affected through mediation for the settlement of disputes using peaceful means in accordance with Chapter VI of the Charter of the United Nations. A database on the development and relief aid opportunities provided by the Qatar Development Fund, the MOFA and other national authorities will be built to prepare and publish relevant reports. Partnership agreements will be signed at the regional and international levels in order to promote joint action to serve humanitarian issues and exchange experiences in international cooperation.

Qatar supports initiatives aimed at qualifying and training young people and it has also made significant contributions and humanitarian support in the area of education in the region. The government will work to achieve that outcome by honoring its education commitments through the initiatives it has launched to educate children of poor countries. The “Educate a Child” initiative aims to educate children who are still deprived of their basic right to education. This initiative engages with the world’s leading expert organizations to provide high-quality education for children affected by extreme poverty, conflict, natural disasters, discrimination or other factors that make it difficult to reach out to them using traditional means. The initiative helps poor countries implement Goal 4 of 2030 Agenda for Sustainable Development which emphasizes the provision of a high-quality education.

It should also be noted that the substantial support and spending provided by the government for scientific research through the Qatar National Research Fund contribute to supporting the 2030 Agenda for Sustainable Development where the Fund

¹⁰⁶<http://www.un.org/sustainabledevelopment/ar/globalpartnerships/>

benefits many researchers affiliated with several Arab and international universities in order to carry out scientific research that promotes economic, social and environmental development.

- **Target 1:** Prepare an executive plan for the International Cooperation Strategy in the first half of 2018
- **Target 2:** Set up regional and international partnerships and sign three development partnership and cooperation agreements in accordance with the priorities of the State by the end of 2022

Intermediate outcome 2: Effective human and institutional capacities for international cooperation

Addressing the challenges of international cooperation in order for it to play an active and effective role at the developmental, relief and humanitarian levels, and making use of the opportunities provided by UN agencies and international organizations and working with them to develop Qatari diplomacy functions in relation to partnership and international cooperation require a clearly defined plan and highly experienced human capacities.

To achieve this outcome, the MOFA will work with partners to develop an integrated executive plan for the International Cooperation Sector under the MOFA's plan to train and qualify relief workers to work in conflict and disaster situations to provide development and relief services to those in need. It will also hold a conference for regional and international organizations to identify possible areas of cooperation and available training opportunities, create an interactive information system on UN agencies and regional and international organizations that includes information on institutional and human capacity-building, create national and international partnerships, and develop a system of material incentives for Qataris wishing to fill positions in UN agencies and international and regional organizations.

- **Target 1:** Build national capacities in international cooperation through training 30 Qataris per year, starting from 2017
- **Target 2:** Increase the number of Qataris working in the field of regional and international organizations, including diplomats, seconded and contract staff, to nearly 30 posts by 2022

Intermediate outcome 3: Improved communication to support coherence in international cooperation activity

The International Cooperation Sector faces some challenges related to coordination, communication and the flow of adequate information on the development and relief projects provided by the State in many areas at the regional and international levels. This requires a communication strategy for partnership for development to sustainably provide information on State projects and on their fields, locations and impact on recipient communities. At the same time, information should be provided on UN agencies and international conventions and instruments, in addition to building a media plan for the International Cooperation Sector to promote the State's international development contributions and raise awareness of the importance of Qatar's contributions to international development goals. Media bulletins will also be issued on the contributions of the international cooperation sector internally and externally.

- **Target:** Upgrade communication of ministries and government agencies with international organizations through the Ministry of Foreign Affairs Department of International Cooperation by 25% starting from 2017.

5. Conclusion

The importance of the International Cooperation Sector Strategy stems from being aimed at establishing organized and effective cooperation and partnerships that address the challenges facing this major development area that intersects with all areas of development at the national and international levels and contributing to the mobilization of many partnerships to strengthen the national humanitarian and relief efforts to save and relief people suffering from war, conflict and the ensuing deterioration in healthcare, education and training all over the world. The ICS is also important in strengthening the contributions of Qatar's diplomacy to conflict resolution efforts and supporting initiatives aimed at assisting, qualifying and training youth and creating jobs for them in different labour markets.

To successfully implement the ICS, the sector needs the efforts and support of many national partners from different sectors, such as the governmental and private sectors and CSOs to achieve the targets set at the national, regional and international levels, foremost among which are enhancing coordination and partnership in project implementation, mainstreaming lessons learned and knowledge about this work, and exchanging experiences in humanitarian and relief work. It should be noted that a successful implementation of ICS goals will build the institutional and human capacities of many national human resources who are interested in development and diplomatic work. Achieving these goals also requires a system to continuously monitor progress and assess the quality of outcomes in order to identify the challenges that may arise during work, address them in a timely manner and help take appropriate decisions informed by accurate and correct information.

6. Annex

Intermediate outcomes, targets, projects, and implementing and supporting agencies that contribute to the main outcome: “effective, orderly and sustainable international cooperation.”

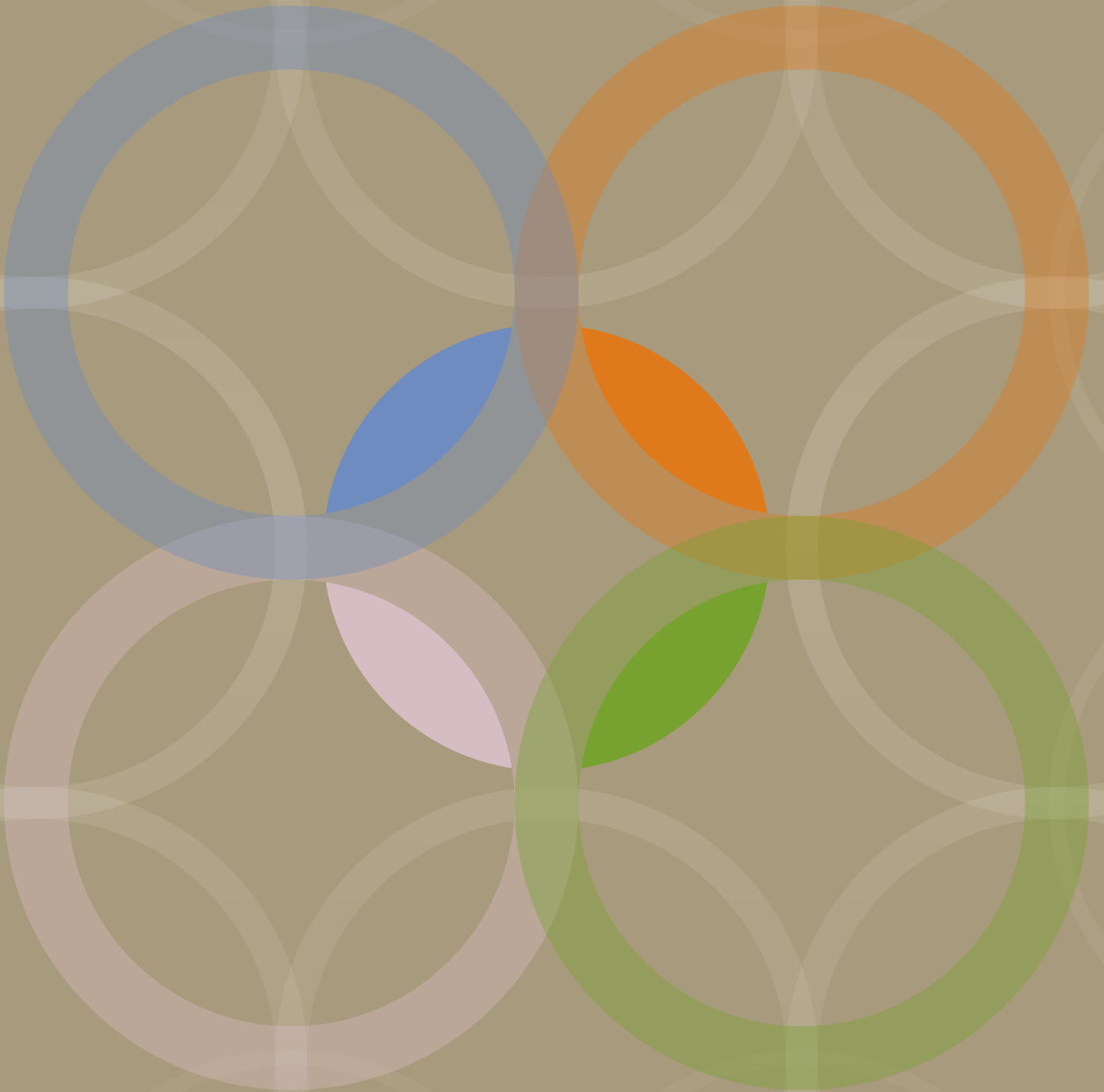
Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Support agencies
Intermediate outcome 1: National development efforts that contribute to promoting the sector strategies alignment with international standards and protecting national gains from emerging and new threats	1.1 Prepare an executive plan for the International Cooperation Strategy in the first half of 2018	Executive plan development	MOFA	Ministries, government institutions, CSOs and the private sector
	1.2. Set up regional and international partnerships and sign three development partnership and cooperation agreements in accordance with the priorities of the State by the end of 2022	Sign 3 regional and international partnership agreements		
Intermediate outcome 2: Effective human and institutional capacities for international cooperation	2.1 Build national capacities in international cooperation through training 30 Qataris per year, starting from 2017	<ul style="list-style-type: none"> - Organize a capacity-building workshop in an area of international cooperation - Organize an annual conference for regional and international organizations to identify possible areas of cooperation and training opportunities 	MOFA	Ministries, government institutions, CSOs and the private sector
	2.2 Increase the number of Qataris working in the field of regional and international organizations, including diplomats, seconded and contract staff, to nearly 30 posts by 2022	Issue a quarterly electronic bulletin to familiarize stakeholders with the UN system and international organizations and with the available job vacancies		

Intermediate outcomes	Targets	Programmes/Projects	Implementing agencies	Support agencies
<p>Intermediate outcome 3: Improved communication to support coherence in international cooperation activity</p>	<p>3.1 Upgrade communication of ministries and government agencies with international organizations through the Ministry of Foreign Affairs Department of International Cooperation by 25% starting from 2017.</p>	<ul style="list-style-type: none"> - Hold an annual forum for directors of international cooperation in ministries, government agencies and CSOs - Develop a renewed electronic application incorporating international cooperation activities in Qatar 	<p>MOFA</p>	<p>Ministries, government institutions, CSOs and the private sector</p>

Part VI: Sustainable Development to Preserve the Environment



Chapter I: Sustainable Development to Preserve the Environment



1. Introduction

Qatar is concerned with the issues of the environment and its sustainability for present and future generations, where humans' interest lies in living in a stable environment in order to lead a healthy life.

In this context, the Qatari permanent Constitution obligates the State to provide a healthy environment that ensures the future, addresses the negative effects of climate change, minimizes pollution, conserves and protects the environment, preserves natural equilibrium and nurtures cultural heritage and biodiversity. Article 29 of the Constitution states: "Natural wealth and resources are owned by the State that shall preserve and exploit them well according to law." Article 33 reads: "The State shall protect the environment and its natural balance to achieve comprehensive and sustainable development for all generations."

Environmental development is also one of the four pillars of nation-building in accordance with QNV 2030. Qatar will carry out the process of economic development with care and a sense of responsibility towards the environment, striking an accurate balance between the requirements of economic and social development and those of the conservation, management and development of the environment. Under an informed implementation of the QNV 2030, the first National Development Strategy 2011-2016 (NDS-1) was developed. It contained fourteen sectors, including the environmental sustainability sector.

The situation of the environment and the socio-economic context pose interrelated and interconnected complex factors that affect the very specific local environment. Oil and gas extraction and industry (hydrocarbon industry) control the State's economy and generate the vast majority of economic returns. On the other hand, this industry produces harmful environmental contaminants during extraction, refining, shipping and transport operations. The consumption of oil products also has a detrimental effect on the environment through flaring emissions that cause global warming which affects the environment, and requires sound strategic planning that takes into account these aspects.

The Environmental Sustainability Strategy 2017-2022 (ESS) aims to strike a balance between economic and social development and to preserve the environment and natural heritage, especially since these activities are accompanied by increased economic and demographic growth, which has put the environment and biodiversity under severe strain. This tests the resilience and immunity of ecosystems and natural resources and requires programmes, projects and activities to help monitor and manage these pressures related to pollution and solid waste to reduce and recycle them in order to avoid their negative effects. This is in addition to observing climate change and minimizing its negative impacts on the environment and biodiversity through the conservation of ecosystems and biodiversity in a scientifically sound and effective manner, taking into account regional and international considerations.

Environmental awareness should form the basis and drive of human relation to environment. Sustainable environmental practices should be developed and implemented in all of the above-mentioned pillars, enabling the country to develop and sustainably prosper.

In environmental management, Qatar looks forward to high-level achievements worthy of the leadership position it intends to occupy at the regional and international level in implementation of the QNV 2030. It also aims to integrate the benefits of the value of the community economy with the development and preservation of the environment so as to avoid any contradiction among the rates of rapid and extraordinary economic growth, social development, the demographic increase rate and the preservation and development of the environment. Further, Qatar seeks to strike an optimum balance between environmental and natural resources and development requirements and activities to ensure social prosperity without prejudice to the rights of future generations placing Qatar in the ranks of developed countries..

The ESS has been developed in line with the overall context, key NDS-2 priorities and targets, QNV 2030 and the Constitution, taking into account the achievements of the first ESS 2011-2016, the overall principles and orientations of the Revised Long-Term Comprehensive Development Strategy for the GCC States (2010-2025), and the 2030 Agenda for Sustainable Development.

The ESS as presented in this Chapter includes an introduction, the progress in the NDS-1, and the challenges facing the environmental sustainability sector. It also determines the main outcome that will become the focus of the sector during the NDS-2 and the intermediate outcomes to be reached through clearly defined national targets.

Before talking about the NDS-1 outcomes, it should be noted that there are important opportunities for a sustainable development that preserves the environment, most importantly that fact that Qatar increasingly uses natural gas and is committed to international conventions and treaties that protect and preserve the environment, such as the United Nations Framework Convention on Climate Change and the Kuwait Convention for the Protection of the Marine Environment. Moreover, there are numerous centers concerned with preserving the environment, such as Qatar University's Environmental Science Center, Qatar Environment and Energy Research Institute – opened in 2011 at Hamad bin Khalifa University – the Environmental Studies Center at the Ministry of Municipality and Environment (MME), and the Friends of the Environment Center. Legislation has also been enacted to preserve the environment, such as the Environment Protection Law No. 30 of 2002.

2. Progress towards the environmental sustainability sector outcomes and targets (2011-2016)

The progress made towards the main outcomes and targets of the NDS-1 was reviewed and evaluated, particularly with the significant demographic increase and high demand for energy, water, food and infrastructure components, especially the major infrastructure projects of the FIFA World Cup, which greatly influenced the progress towards environmental conservation. This is in addition to the impact of the restructuring of ministries and stakeholders of the environmental sector, notably the merger of the Ministry of Municipality and Urban Planning and the Ministry of Environment into the Ministry of Municipality and Environment (MME), by virtue of Emiri Decree No. 4 of 2016. The pillars of the previous ESS (2011-2016) differ from those of the current ESS 2018-2022 that does not include the water sector since the water functions have been moved to the Ministry of Energy and Industry and the common aspects and pillars will be highlighted.

The ESS of the NDS-1 was developed under the rubric of preserving the environment for the future generations and it contained 6 sector outcomes and 12 specific targets (excluding the water sector outcome and targets). Two targets were achieved, while the others are still in progress with some being updated. Some of the programmes and projects under the targets of the plan were implemented. Here below we will review the main sector outcomes and achievements.

NDS-1 sector outcomes

Sector outcome 1: Clean air and effective climate change responses

The outcome has two targets: (1) Eliminate instances of excess ozone levels through improved air quality management; and (2) Halve gas flaring from 0.0230 to 0.007 billion cubic meters per million tons of energy produced.

The first target was not achieved as the number of days in which ozone safe levels were exceeded increased. However, some activities of the project of this target were implemented. Had not these activities and projects been implemented, the situation

would have been worse. These activities include an advanced air quality monitoring, reporting and verification programme that helped provide some necessary data; updating regulations and standards on air quality and implementation mechanisms to reduce pollution and increase compliance with environmental regulations; implement the Tarsheed Program, which has succeeded in reducing harmful carbon emissions by about 5 million tons since its launch in April 2012, due to the reduction in per capita consumption of electricity and water. Through the Ministry of Energy and Industry represented by Kahramaa and Tarsheed, the Green Car initiative was launched to transform 4% of transport vehicles into electric vehicles by 2022 reaching 10% by 2030. A regional air quality convention was launched through the GCC Green Initiative, in addition to a number of projects to reduce flaring during industrialization and extraction of oil and gas, some of which were completed, while others are in progress.

The second target was achieved with gas flaring reduced from 0.023 billion cubic meters per million tons of energy produced in 2008 to 0.007 billion cubic meters per million tons in 2012. Qatar has also pledged that the FIFA 2022 World Cup will be carbon-neutral.

Sector Outcome 2: Reduced waste, more recycling and more efficient use

This outcome contains three targets: 1) Establish a solid waste management plan, strongly emphasizing recycling; 2) Recycle 38% of solid waste, up from the current 8%; and 3) Contain domestic waste generation at 1.6 kilograms per capita per day.

The first two targets were not achieved because they were too ambitious, so they have been adjusted in the NDS-2. The third target was achieved as the State managed to contain domestic waste generation at 1.3 kg per capita per day, which is better than the specified target. Some projects and activities in support of this outcome were implemented, such as the opening of a Domestic Solid Waste Management Center in Mesaieed and 4 waste transport stations in October 2011, the launch of a tyre recycling project in Umm Al Afai in 2012, with a recycling rate of more than 60%, the adoption of a number of construction specifications that include recycled materials, and the development and issuance of national instructions on the management of medical and radioactive waste.

Sector outcome 3: Nature and natural heritage conserved, protected and sustainably managed

The third outcome contains two main targets: 1) Establish a comprehensive electronic biodiversity database; and 2) Expand actively managed protected areas. This means the management of programmes for the conservation, preservation and sustainable use of natural resources and biodiversity. The two targets have not yet been achieved owing to a lack of human and financial resources for implementation.

Although the above two targets were not met, some activities of the project of the first target were implemented, in addition to many programmes and projects that helped preserve nature and biodiversity, mainly: 1) A study on the biodiversity of wild birds through the Qatar Birds Project at the Friends of the Environment Center: It detected 322 species of birds with an increase of 33% compared to the number recorded in the 4th National Report on the implementation of the Convention on Biodiversity. 2) A project on the biodiversity of lizards by the MME and Qatar Foundation (QF) (2012-2013): It detected 21 species of lizards compared with 15 species previously registered. The study registered two types of lizards for the first time in Qatar. 3) An MME project to enumerate and characterize the genetic resources of domestic animals: Over the period 2013-2016, camels were enumerated and characterized. Sheep, goats and other species are being enumerated and characterized. 4) A pioneering and successful program for the breeding and resettlement of endangered animals in captivity, especially the Arabian oryx, goitered gazelle, ostrich and Houbara (MME). 5) Qatari Wild Life Rehabilitation Project was launched by the MME so as to preserve the vegetation cover, rehabilitate natural areas (rawdat) and cultivate wild life areas with localized plants, given the high degradation and loss of habitats affecting wild life in general and rawdat in particular. 6) An MME

project to enumerate, record and conserve wild plants: During the field trips in 2012-2016, the project collected 320 seed inputs and 473 plant inputs. 7) A project to establish a Field Genetic Bank at the MME Rawdet al-Faras Research Station with the aim of conserving important, rare and endangered local species: Some trees and bushes were conserved, including sassaoul, haloxylon, acacia ehrenbergiana, acacia tortilis, lycium barbarum, atriplex, ziziphus spina-christi, prosopis, acacia nilotica, etc.

Sector outcome 4: More sustainable urbanization and a healthier living environment

The target of this outcome; namely, “Establish three shady green space corridors in Doha and monitor their effect on health and air quality in urban areas” was not materialized. However, numerous relevant projects, activities and programs were implemented in this regard through the increase of parks and green spaces, such as the establishment of 40 integrated parks all over the country during the period 2010-2016, raising the number of parks to 87 compared to only 48 in 2010. Also, some 37,000 ziziphus (sidr) trees and local plants were cultivated in various municipalities during the period 2012-2016 and work is ongoing in this regard.

QF plays a major role in sustainability in the region and strives to make Qatar environment friendly. In 2012, the Qatar National Convention Center was awarded the Golden Certification in Leadership in Energy and Environmental Design (LEED) by the US Green Building Council. In 2013, QF’s Student Accommodation Complex was awarded a Platinum LEED in the new buildings category, and it now has the highest percentage of buildings holding platinum LEED registered independently in the world. QF’s Strategic Plan 2013-2023 focuses on ensuring an advanced position and a secure and sustainable infrastructure.

Sector Outcome 5: Increase the environmental awareness of the population

This outcome has two targets: 1) Build an environmentally aware society; and 2) Appoint a well-known national environment defender to raise awareness and commitment through demonstration projects and dialogue partnerships.

Overall, the first target made some progress through the implementation of a number of projects and activities, but it is still there in the NDS-2, which is necessary because it is impossible to build such awareness within a few years. It is also necessary to develop and implement a methodological tool to measure environmental awareness, such as sample surveys, before and after the implementation of the NDS-2 in order to determine the role of the programmes, actions and projects proposed to achieve the target.

Concerning the second target, Nasser Al-Attiyah (Qatari rally driver) was appointed a Goodwill Ambassador for Environment Protection on the occasion of the 2013 Qatar’s Environment Day to raise environmental awareness.

Various State actors play a significant role in environmental awareness through implementing numerous activities, programmes and events. For example, MME activities during 2016 were as follows: More than 210 issues of the daily Municipality and Environment Bulletin and over 300 issues of the daily Media Monitoring Bulletin were issued to officials. The MME examined the proposals of more than 30,000 customers and followed-up on their observations through its many communication channels. The MME’s accounts on social media had noticeable interaction and an increasing number of followers (e.g. over 100,000 followers on Twitter during 2016), in addition to organizing numerous major conferences, workshops and events, such as the Darb Assa’ee event, World Environment Day event and other activities.

The Tarsheed (Rationalization) campaign – launched by the Qatar General Electricity and Water Corporation – is a good example of sustainable awareness efforts that aim at promoting a culture of responsible consumption.

Sector outcome 6: Improved environmental management and regional and international cooperation

This outcome has two targets: 1) Create a searchable electronic information source at the MME; and 2) Lead unified regional environment project.

The two targets were not achieved during the Strategy period. However, through regional and international partnerships in this area, public-private partnerships were established to conduct scientific studies in cooperation with the World Bank (WB). Further, the Qatar Environmental Action Programme (2011) was launched to strengthen the institutional capacity to achieve environmental sustainability. A highlight of Qatar's role at the international level was hosting the United Nations Climate Change Conference (COP18) in 2012.

3. Challenges facing environmental sustainability sector (2018-2022)

The environment faces many challenges and pressures for many reasons related to environmental and climatic features. There are also many challenges due to high population growth rate which puts pressure on the environment and natural resources, in addition to large urbanization as a result of population growth and increased economic activities, especially since the majority of these activities depend on oil, gas and petrochemical industries, causing significant negative impacts on the environment and biodiversity as a result of pollution and increased waste; and climate change and its negative effects.

For these reasons, the NDS must clearly enhance national prosperity and address the constraints of environmental determinants and features, and the operational, structural and managerial challenges to the implementation of environmental sustainability plans and projects.

Climatic and environmental features and challenges

The Qatari environment is one of the difficult environments with a very hot tropical climate, high humidity, low rainfall rate (80 mm/year) and no fresh water bodies like rivers and lakes. The groundwater is the only source of fresh natural water, in addition to low soil fertility, high salinity and low grazing load.

The environment should therefore be dealt with great care and sustainable professionalism. The high rate of population growth and the tremendous urbanization of recent years are already placing enormous strain on ecosystems and the necessary and essential systems that support wildlife. However, species living in these ecosystems have followed unique and interesting adaptations to survive in that very difficult environment. Such species have acquired unique features that must be tapped.

Exceptional population growth rate and related challenges

The population has continued to grow significantly, rising from 1.8 million in 2012 to over 2.6 million in 2016.¹⁰⁷ This increase is expected to continue until 2020 and the number then will gradually decrease due to the completion of many major construction projects. The number may reach just over 2 million people in 2030. That large population increase affects all other areas and pillars of the ESS as a result of meeting people's needs for facilities and urbanization to create new residential areas, thus accelerating the pace of urban sprawl and increasing cars and construction equipment. This in turn increases greenhouse gas emissions, solid waste produced, pollution and pressure on natural resources, especially water. The environmental impact is undoubtedly closely linked to the increase in population and then to welfare and the technologies used.

¹⁰⁷ The population growth contradicted the NDS-1 expectation: Qatar National Development Strategy document 2011-2016, p.5

4. Main outcome, intermediate outcomes and specific targets in the environmental sustainability sector (2018-2022)

The interventions included in the environmental sustainability sector in the NDS-2 will be built on what was achieved in the NDS-1, while correcting errors and learning lessons. This will put the State on the right track for a sustainable environmental development without hindering the increasing economic and social growth. Emphasis will be placed on building local capacity, drawing on global experiences to obtain the best new ideas and innovations.

The ESS has a main outcome: **“Sustaining the environment for future generations”** and intermediate outcomes: 1) A less polluted environment that ensures the health of humans and ecosystems; 2) A less climate-sensitive environment that ensures sustainable development, health and environment safety; 3) An environment that preserves biodiversity to ensure sustainable development and human health and well-being; and 4) Promote sustainable environmental practices.

There are nine targets and nine projects (Annex 1) to achieve the ESS, namely:

Intermediate outcome 1: A less polluting environment that ensures the health of humans and ecosystems

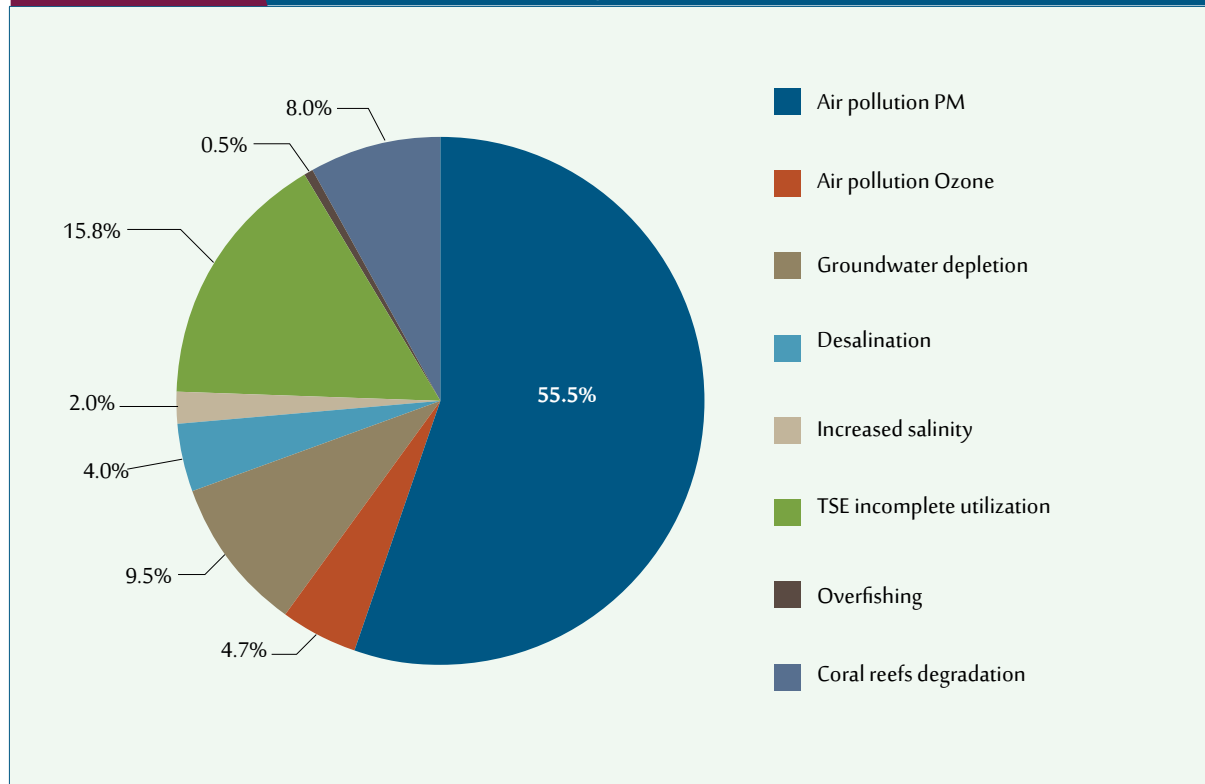
Pollution is a major environmental issue to which the State attaches great importance, be it air, soil or water pollution. Polluted air harms humans, animals and plants; involves life-threatening diseases; and causes global warming and subsequent adverse climatic changes. Water and soil contaminants also threaten the health and life of humans and animals and the ability of farmers to produce the food necessary to feed the population. Marine pollutants also threaten many marine organisms. The right step in formulating the targets on pollution is to identify the sources and type of contaminants, learn about their negative effects, and thus develop, implement and follow-up on appropriate programme and projects through performance indicators to reduce all types of pollution and support and strengthen the capacity of creatures and ecosystems of all kinds to ensure sustainable development.

Various sources of pollution and their physical cost

A study of the financial cost of the adverse effects of various sources of pollution as a result of environmental degradation – conducted by the WB and MME during the Mid-Term Review of the NDS-1 – estimated that 55.5% of the cost resulted from air being polluted with particulate matter followed by the cost of not using all TSE (15.5%), groundwater depletion (9.5%) and degradation of coral reefs (8.0%). The cost of any other source is less than 5% (Figure 6.1.1). The cost of current and future impacts of environmental damage is approximately QAR 9.9 billion annually or 2.2% of GDP in 2010.

Figure 6.1.1

Ratios of financial costs of the adverse effects of different sources of pollution as a result of environmental degradation



Source: MME and WB, 2014

Air pollution

Air pollution is caused by gas emissions, dust and various particles that reach the atmosphere and alter the balance of its natural components. Air pollution is the greatest challenge to the environmental sustainability sector. This requires an accurate and comprehensive monitoring mechanism to learn about air quality in general in order to determine the ratios of various local and cross-border pollutants, their impact on air pollution, and the impact of the desert environment on air quality and consequently on health.

Particulate matter with a diameter of less than 10 microns (PM10) and of less than 2.5 microns (PM2.5) and ozone are the main pollutants of concern, and they are known to have negative effects on health (respiratory diseases that may lead to premature death). According to a recent study (Institute of Health Metrics and Evaluation, 2015), the number of annual premature deaths in Qatar was 250 due to exposure to PM2.5 and ozone. Nonetheless, the high levels of natural dust in the environment exacerbate uncertainty of these estimates, requiring further studies. Qatar is one of the few countries in the region that has standards for ambient air quality. Table 6.1.1 shows that together with the guidelines of the World Health Organization (WHO).

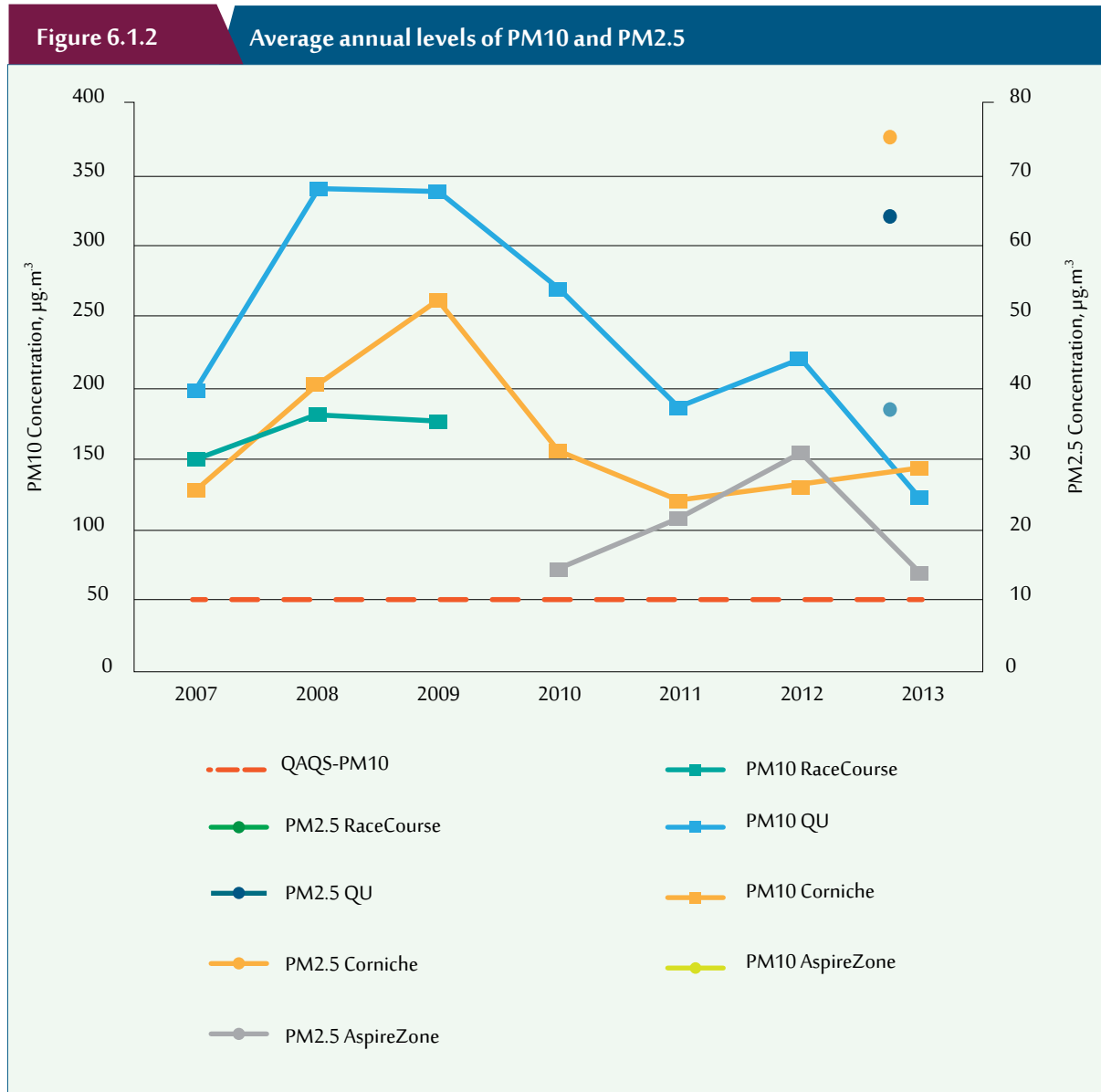
Table 6.1.1: Qatari ambient air quality standards

Contaminant	Ambient air quality standard in Qatar QAAQS	WHO	Average period
Photochemical Oxidants, such as O ₃ [$\mu\text{g.m}^{-3}$]	235	100	1 hr
	120		8 hrs
PM10 [$\mu\text{g.m}^{-3}$]	150	50	24 hrs
	50	20	Annual
PM2.5 [$\mu\text{g.m}^{-3}$]		25	24 hrs
		10	Annual

Source: MME, 2002; and WHO recommendations (WHO, September 2016)

Figure 6.1.2 shows the average annual levels of the main pollutants according to data of MME monitoring networks. PM10 levels were much higher than the standards, despite showing a downward trend. data available on PM2.5 are only for the year 2013, but their levels are much higher than the WHO guidelines.

The Ministry of Public Health assesses air pollution. In 2015, it funded a field study to assess indoor air pollution and describe indoor and outdoor PM (Saraga 2016). The recorded levels of PM10 and PM2.5 in the ambient air were about 330 and 130 $\mu\text{g}/\text{m}^3$ respectively, which are very high. Indoor levels were much lower (nearly 10 $\mu\text{g}/\text{m}^3$), but were significantly affected during harsh external conditions, such as dust storms. There are three PM monitoring stations at Qatar University, the Corniche, and Aspire Zone.



Source: Official Air Quality Monitoring Network based on data published by Qatar Statistics Authority in 2015 (MME, 2015)

An NDS-1 target was: “Eliminate instances of excess ozone levels through improved air quality management.” However, the number of days in which the ozone safe levels was exceeded (for an average of one hour and eight hours) in the MME’s three monitoring stations in 2012 was high, which caused Qatar to fail in achieving the target. Table 6.1.2 shows the number of days in which ozone safe levels were exceeded over 2008-2012. One possible reason for increasing ozone levels is the increase in the number of automobiles as well as industrial emissions, which require studies to verify this. It is important to note that the frequency of exceeding PM10 levels was reduced, possibly due to improved control of industrial emissions.

Table 6.1.2: Number of annual days in which some contaminants exceeded the Qatari ambient air quality standards, 2008-2012

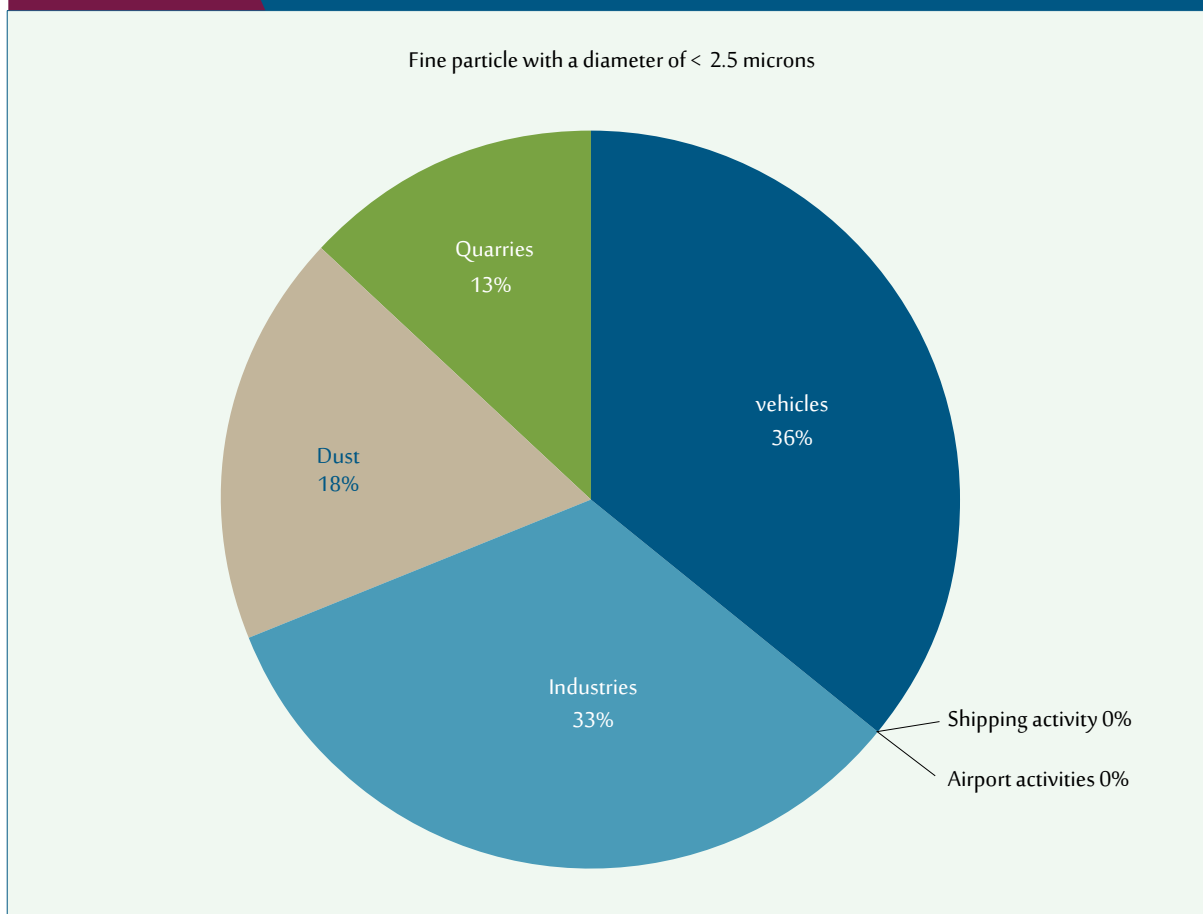
Pollutants	Year				
	2008	2009	2010	2011	2012
Particulate Matter (PM10)	138	156	96	77	70
Ground level ozone (O3)	0	1	0	29	41
Sulfur dioxide (SO2)	0	0	0	0	0
Nitrogen dioxide (NO2)	0	0	2	0	2
Carbon monoxide (CO)	0	0	0	0	0

Source: MME, Environmental Sustainability, Natural Resources and Built Capital Strategy 2017-2022 (2016)

WB – Annex 1 on environmental sustainability in Qatar (2016)

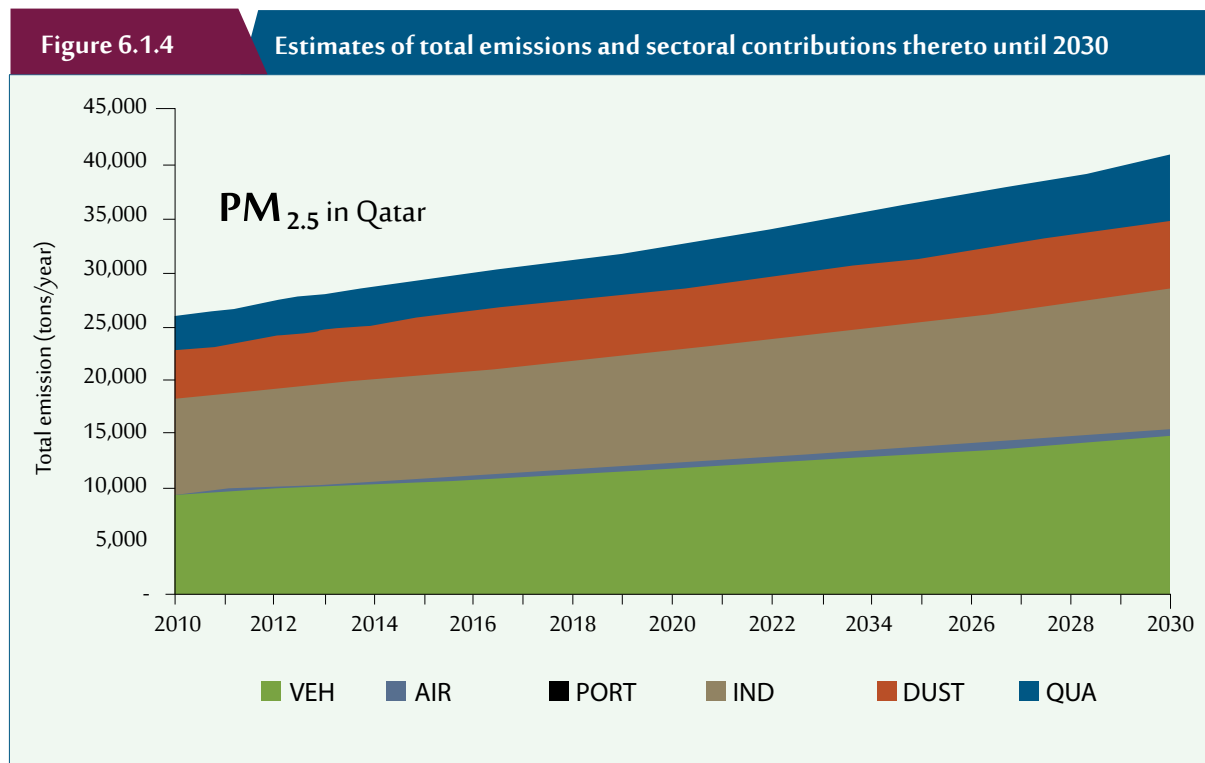
The assessment of air pollution in Qatar (MME and WB, 2014) provided an insight into the contribution of various sources to pollution. For PM2.5, the transport sector was found to have the largest share of total emissions, followed by industries (Figure 6.1.3). Furthermore, projected emissions of PM2.5 are steadily increasing until 2030 (Figure 6.1.4).

Figure 6.1.3 PM2.5 emissions by sector in 2012



Source: MME, Environmental Sustainability, Natural Resources and Built Capital Strategy 2017-2022 (2016)

WB – Annex 1 on environmental sustainability in Qatar (2016)



Source: MME, Environmental Sustainability, Natural Resources and Built Capital Strategy 2017-2022 (2016)

WB – Annex 1 on environmental sustainability in Qatar (2016)

Measures must be taken to address cases of contamination with PM_{2.5} and ozone, including understanding pollutant sources through studies that examine the contribution ratios of each source. Monitoring needs to be improved using a larger network of monitors to be able to assess air quality throughout the country and identify hot spots. The ability to model air quality is also important to assess how emissions from different sources within the country are spread. Mitigation strategies must be reviewed to ensure compliance with national air quality standards, as well as launching a regional air quality convention through the GCC Green Initiative, conducting an integrated study on the impact of air pollution on human health and updating indoor air quality standards.

■ **Target:** Reduce the levels of air pollutants in accordance with Qatar's ambient air quality standards by 2022

Marine environment

The marine environment is characterized with long coastlines and diverse marine resources, including coral reefs, seaweed, mangrove trees, breeding areas of fish and crustaceans, and breeding, nesting and feeding areas of sea turtles and dugongs.

Unfortunately however, despite the availability of environmental specifications, licencing and monitoring, that unique environment is exposed to multiple sources of drainage, including hot cooling water flowing from industrial zones which in some drains exceeds 1 million m³/h, brine from power and desalination plants which is almost twice the salinity of seawater, and drainage of groundwater/surface water and rainwater on the Doha Corniche through four main drains that drain nearly 75.5 million m³/year according to 2015 data, in addition to 13 rainwater sub-drains .

On its way from pumping stations to the Corniche, groundwater/surface water is mixed with rinse water, most of which flows into the groundwater/surface water network of the Public Works Authority, in addition to the drainage of brine and blowdown water from cooling plants after treatment. This water carries huge quantities of organic and inorganic compounds

to the marine environment, altering their characteristics and type and causing pelagic and demersal marine life to migrate. There are also backfilling and drilling operations for ports and residential and tourist islands, as well as various sea-based activities of hotels and resorts. WB reports also indicate that marine pollution is the greatest threat to the marine environment, with many pollutants being poured into the sea through several activities, including power plants, desalination plants, ballast water discharged by ships, and petrochemical industries.

In light of the rapid industrial and urban development of the country, the urgent need to maintain water safety and quality requires a comprehensive marine environmental control plan aimed at determining the current situation, predicting future changes and making recommendations and mechanisms to preserve the marine environment and ensure sustainability of its resources.

■ **Target:** Improve coastal and marine water quality to conform with Qatar’s standards by 2022

Waste

Waste in Qatar is one of the most pressing environmental problems due to increasing rate of generation. The generation rate of household solid waste is estimated at 2.1-4.1 kg per capita/day in GCC States, 1.2 in the US, and 4.1 in EU countries, compared to 1.6 in Qatar. Domestic solid waste usually consists of different proportions of organic matter (food waste, etc.), paper, plastics, glass, metals, fabrics, bones, leather, home dust, etc. Domestic solid waste in Qatar is the second largest source of waste after construction waste.

The generation of total solid waste (construction, domestic and others) increased from 8 million tons in 2008 to 12 million tons in 2013. It however returned to 9.8 million tons in 2014 and continued to fall to 7.7 million tons in 2015 (MME 2017). The main reason is a declining production of construction waste (traditional waste of demolition and construction) (the first source of waste) that constitutes 70-80% of waste. Table 6.1.3 shows the quantities and types of waste and the treated amounts during 2015 and 2016.

Standard recyclable materials include glass, paper, cardboard, metals, plastics, tires, textiles and electronics. A high proportion of construction waste, especially cement, brick and tile waste, is fully suitable for crushing and recycling as a replacement of gravel extracted from new quarries in some lower applications, most notably the subbase of roads.

Table 6.1.3: Total waste quantities produced and treated (tons) during 2015 and 2016

Type	2015		2016	
	Quantity received	Quantity treated	Quantity received	Quantity treated
Tires*	36,297	22,202	31,386	20,385
Construction waste**	4,276,414	459,857	3,796,540	438,079
Domestic waste	482,640	Unavailable	443,968	Unavailable

Source: MME, Environmental Statistics, 2017

*The percentage of tire waste treated through the Tire Recycling Project in Umm Al Afai is 61-64%.

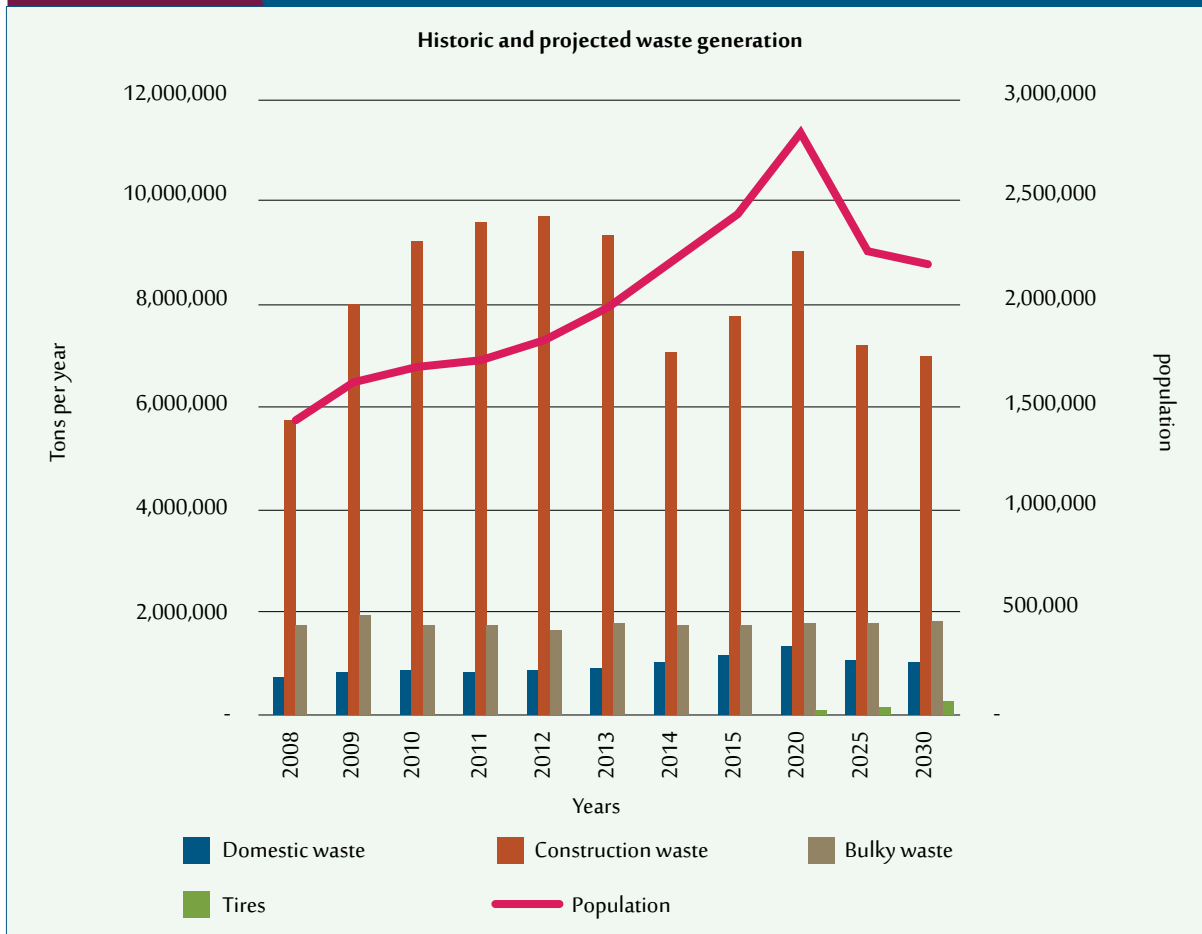
**The percentage of construction waste treated for recycling is 10-11%.

The production of total solid waste is typically linked directly to the population and is influenced by the rate of economic development, degree of industrialization and urbanization, and local culture. Figure 6.1.5 shows the production of total waste since 2008, the projected future scenario up to 2030 and the estimates of population growth where the amount of waste will increasingly grow until 2020, and then decline slightly with the expected decline in population.

The quality and quantity of hazardous substances and waste of hospitals, chemical factories, etc. should be identified in addition to developing a clear national plan for transport, safe disposal, treatment and storage since they have short/long-term negative effects on soil, groundwater, and the health of humans and all creatures.

Figure 6.1.5

Historic and projected waste generation (production) from 2008 to 2030



Source: MDPS: Demographic, social and environment statistics and WB expert estimates

Municipalities and Urban Planning needs to be updated. Moreover, it did not take into account construction waste that accounted for 79.2% of total solid waste generated in 2012. Statistics for 2012 also show that approximately 3-6% of total solid waste was recycled, far below the environmental sector target of 38% by 2016. The steady and rapid population growth rate raised the amount of domestic solid waste beyond the capacity of the Mesaieed Solid Waste Management Center with only 60% being managed, while the remaining amount is buried in the Mesaieed landfill.

As the infrastructure works of the FIFA World Cup and related demolition and rebuilding of enterprises is nearing completion, the generated amount of construction waste is expected to decrease. Moreover, the State is making significant efforts to increase the waste recycling rate and promote environmental awareness on reducing the quantity of domestic solid waste, making it possible to achieve the target of recycling 15% of solid waste over the course of the NDS-2.

■ **Target 1:** Fix the domestic waste generation rate under 1.6 kg per capita/day during the period 2018-2022

■ **Target 2:** Recycle 15% of the solid waste generated by the end of 2022

Intermediate outcome 2: A less climate-sensitive environment that ensures sustainable development, health and environment safety

Climate change is a major challenge facing countries around the world, especially the oil- and gas-producing countries that have petrochemical projects and plants, like Qatar. Climate change has now become a reality, with Qatar's average annual temperature rising by 0.3 °C over the past 40 years. This average is projected to increase by 1.5-3 °C by 2050 and by 2.3-5.9°C by 2100, which will cause many negative effects.

This will result in more water stress and adversely affect labour productivity due to health effects and growth. The country is also highly susceptible to sea level rise where a rise of less than five meters will make 18.2% of Qatar's area flooded with water by the end of the century. Given that 96% of the population lives in coastal areas, this will have great implications for life and livelihoods. The predicted rise in sea level by the end of this century will expose vast areas of the built environment to sea water and increase coastal erosion. It has become very difficult to predict rainfall as it rains at short intervals but often heavily, causing floods in coastal areas. This is likely to increase as the ability to predict rainfall and its heaviness is declining.

The creation of a green belt around Doha and its environs will play a major role in improving environmental and health conditions. From a health point of view, green belts and areas are the lungs through which cities breathe and a major means to reduce global warming and the erosion of ozone layer. Plants absorb the air-polluting gases, mainly carbon dioxide, through photosynthesis and release oxygen. Leaves in their various forms and surfaces capture air-borne solid atoms, thus they are necessary enablers to purify the air breathed by humans and all creatures. Moreover, green belts have a great effect on wind movement and direction and they reduce wind speed and lower its heat, especially since wind carries dust and sand which the country is exposed to occasionally, causing a lot of environmental and health damage. They also soften local weather conditions by helping reduce day temperature in summer, in addition to their aesthetic appearance.

■ **Target:** Create a green belt around Doha and its environs by 2022

Intermediate outcome 3: An environment that preserves biodiversity to ensure sustainable development and human health and well-being

Biodiversity is a part of Qatar's heritage, culture and future. It is a necessity for survival given the food, clothing, medicine, fuel sources and other benefits it provides in order to preserve national and cultural identity, food security, local development, the foundations for scientific and medical research, etc. A loss of biodiversity cannot be easily compensated, especially in a harsh arid environment like ours. Therefore, these important resources must be preserved.

With a 550-km coastline, Qatar's area is nearly 11,627 km². Qatar has a number of islands, rock ranges and shallow waters on the coast. It also has land habitats, such as mangroves and swamps, in addition to sand dunes, rocky and gravel areas, valleys, coral reefs and diverse marine life.

According to data of the MME and of the International Union for Conservation of Nature (2015), around 2,040 species have been discovered so far (1,152 terrestrial species and 888 marine species).

The terrestrial species include 8 species of mammals, 322 species of birds, 29 species of reptiles, 1 amphibian species, and 228 species of invertebrates. Plant life consists of 422 species of plants and 142 species of fungi. Two species have become extinct, and there are nine endangered species and 171 vulnerable species. Endangered species include Arabian oryx, large dotted eagle and corncrake.

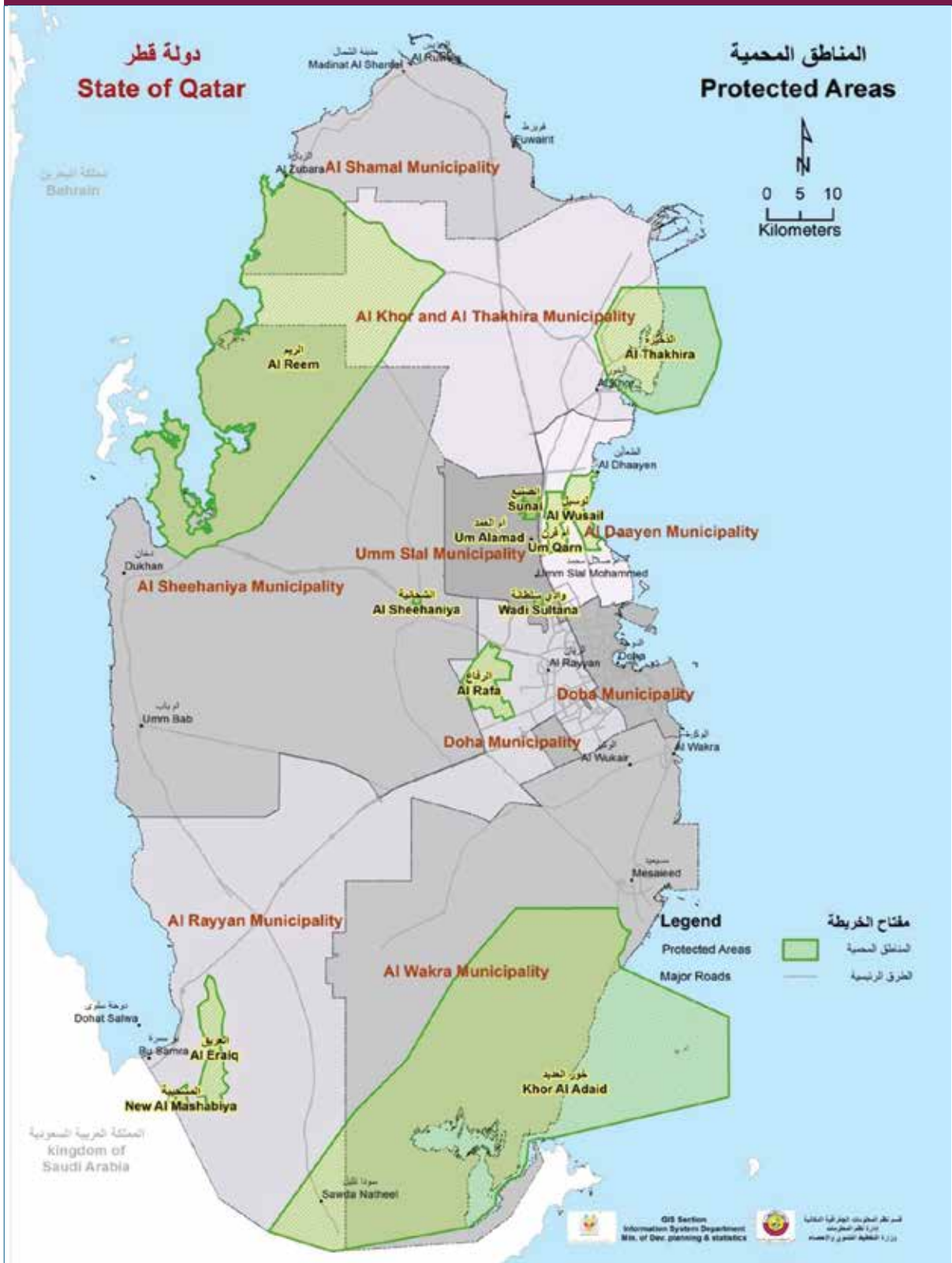
As for marine species, 402 species have been registered in addition to 57 species of plants, 15 species of mammals, 379 species of invertebrates, 15 species of birds and 20 species of reptiles. Six species are endangered, 22 are vulnerable and 7 are near threatened. Rapid industrialization, climate change, invasive species, water scarcity and habitat erosion pose significant threats to biodiversity.

It is known that rapid development and population growth are pressing the natural environment. This necessitated the integration of biodiversity conservation into the NDS. For this reason, the original 2004 National Biodiversity Strategy and Action Plans were updated to review, prioritize and make targets more specific, realistic, time-bound and in line with the QNV 2030 and the NDS-1. The government has set a 10-year time frame (2015-2025) for the implementation of the revised National Strategy and Action Plans. As part of the NDS-1, the government also sought to establish a biodiversity database and it still needs to work on it.

Protected areas are the cornerstone and primary refuge for biodiversity conservation and protection. Over the past 10 years, the area of protected land areas has increased from 11% to 23.6% or 2,744 km², in addition to 6.2% (720 km²) as protected marine areas, making the protected area (land + marine) total 3,464 km² or 29.8% of Qatar's area (Figure 6.1.6), which is one of the highest percentages in the world.

Most protected areas are terrestrial aimed to protect sensitive desert ecosystems from overhunting, overgrazing, development and desertification. However, the designation of protected areas alone without proper management does not ensure the protection of natural ecosystems within their borders. Currently, no monitoring or management measures are effectively implemented in protected areas to assess their effectiveness or performance. The government is therefore endeavouring to effectively and efficiently manage protected areas as part of the process of economic development and planning that leads to sustainable development through the following specific targets and projects.

Figure 6.1.6: Terrestrial and marine nature reserves in Qatar, 2015



Source: MDPS, Environmental Statistics 2015

- **Target 1:** Raise awareness of the current and future status of biodiversity and create and operate a biodiversity database by the end of 2022
- **Target 2:** A sustainable management of nature reserves and ecosystems by 2022

Intermediate outcome 4: Promote sustainable environmental practices

Having a sustainable and robust environment for future generations requires a responsible and active institution and entities to manage the environment and promote environmental awareness among members of society.

Improving environmental management

An active and effective environmental management requires government task teams and clear responsibilities to ensure informed implementation, in addition to identifying the pillars and areas where cooperation can be carried out at the regional and international levels to serve local and common issues. Environmental issues are of great regional and international proportions. There is also a need to identify areas where international expertise could be utilized.

The government will be in great need of data on pollution, climate change, biodiversity and others in order to make appropriate environmental management decisions based on accurate and comprehensive facts and data. This necessitates a database on Qatar's environment to make required and accurate data available in a timely manner, facilitating decision-making for policy makers. The government will promote the provision and exchange of information among the various MME departments and among the MME, other government agencies, the private sector and the relevant community.

- **Target:** Provide the required data on the Qatari environment to promote and improve environmental management by 2022

Promoting environmental awareness

Environmental sustainability requires an active and effective participation by all groups and members of society. There is a large and growing dependence on automobiles and rising electricity and water consumption for green space irrigation and car washing using scarce desalinated water. Household air cooling consumes two-thirds of electricity. Industrial and urban activities and the resulting large-scale waste and air and water pollution are on the rise. There are also violations against terrestrial and marine ecosystems and unique biodiversity.

Environmental awareness campaigns therefore must be carried out to familiarize individuals with environmental considerations, requirements, sensitivity and conservation methods; change the behaviours and practices harmful to the local environment; and promote proper management, especially for water and electricity resources through Tarsheed and Kahramaa Awareness Park. The promotion of community-based environmental conservation initiatives and support for the efforts of State and private institutions concerned with environmental conservation and development are one of the important pillars. Environmental education must be supported through curricula, broadcast and printed media, and modern social media.

- **Target:** Build an environmentally aware and supportive society for environmental sustainability

5. Conclusion

The Environmental Sector Strategy (ESS) is important in view of the importance of environmental issues and to the need to sustain the environment for the present and future generations. The ESS aims to strike a balance between economic and social development and the conservation of the environmental and natural heritage.

The ESS-2 complements the ESS-1 (2011-2016) that had some relatively slow progress, which prevented desired outcomes. Therefore, achieving outcomes and implementing various projects in the ESS-2 (2017-2022), the implementation of which is an MME responsibility, requires close cooperation with supporting partners. Committing to the implementation process will undoubtedly lead to the fulfillment of the various commitments and activities addressed in the ESS. A key factor in the success of any project is a real understanding of its nature, the resources and information it requires, and implementation mechanisms. Also essential is how well the executing entity is ready in all aspects and then the follow-up and evaluation process during the life cycle of the project in order to leverage and enhance positives and learn the main challenges and how to confront and overcome them.

To ensure successful and sustained implementation of projects, it is very important to learn from the ESS-1 outcomes, in particular with regards to emerging challenges and how to address them, and the need for cooperation and coordination with all stakeholders for the success of the implementation process in which the ESS will be achieved to a large extent.

6. Annex

Intermediate outcomes, specific targets, projects and implementing and supporting agencies that contribute to the main outcome: “Sustaining the environment for future generations.”

Intermediate Outcome	Specific Targets	Programmes/Projects	Implementing agencies	Supporting agencies
Intermediate outcome 1: A less polluting environment that ensures the health of humans and ecosystems	1.1 Reduce the levels of air pollutants in accordance with Qatar’s ambient air quality standards by 2022	Develop and implement a national integrated air quality management plan	MME	QP MOPH Kahramaa
	1.2 Improve coastal and marine water quality to conform with Qatar’s standards by 2022	Develop and implement a comprehensive coastal and marine water quality control plan	MME	QP
	1.3 Fix the domestic waste generation rate under 1.6 kg per capita/day during the period 2018-2022	Develop and implement a solid waste management plan to operationalize recycling mechanisms, rehabilitate contaminated sites and deal with hazardous materials and waste	MME	QP Private companies
	1.4 Recycle 15% of the solid waste generated by the end of 2022			
Intermediate outcome 2: A less climate-sensitive environment that ensures sustainable development, health and environment safety	2.1 Create a green belt around Doha and its environs by 2022	Develop and implement a national plan for adaptation and mitigation of climate change impact and promote local, regional and international strategic partnerships	MME	MOTC MOEI QP
Intermediate outcome 3: An environment that preserves biodiversity to ensure sustainable development and human health and well-being	3.1 Raise awareness of the current and future status of biodiversity and create and operate a biodiversity database by the end of 2022	Create and operate a National Biodiversity Database	MME	MEHE Public and private media

Intermediate Outcome	Specific Targets	Programmes/Projects	Implementing agencies	Supporting agencies
	3.2 A sustainable management of nature reserves and ecosystems by 2022	Develop and implement an integrated plan for the management of protected areas and various ecosystems	MME	UNESCO
Intermediate outcome 4: Promote sustainable environmental practices	4.1 Provide the required data on the Qatari environment to promote and improve environmental management by 2022	Create an electronic and researchable information database at the MME	MME	MEHE Public and private media
	4.2 Build an environmentally aware and supportive society for environmental sustainability	Promote environmental awareness, especially for future generations	MME	MEHE Local communities Kahramaa

**Part VII: Managing the Performance of the Second
National Development Strategy 2018-2022**



Chapter I: Monitoring, follow-up and evaluation of the NDS-2 performance 2018-2022



1. Introduction

The management of the NDS performance is based on one of the most important principles emphasized by HH the Emir in his guiding speeches; namely, the continuous development and modernization of public sector institutions with a view to having an efficient, transparent and accountable public sector. HH the Emir focused on the need to identify the challenges that faced the implementation of some of the programmes and projects of the NDS-1 2011-2016 and to draw learned lessons to avoid these constraints in future development strategies.

Based on those guidelines and in light of addressing the targeted challenges, the Strategic Performance Management System (SPMS) of the NDS-2 2018-2022 has been designed to provide necessary tools to monitor and follow up on the performance of the projects that were developed to achieve and realize strategic targets through clear, measurable and comparable key performance indicators. The SPMS will also provide a systematic & robust platform to periodically measure the performance effectiveness of inputs (resources), implementation efficiency (actions) and the desired impact (outcomes measurement).

2. Challenges and lessons learned from measuring the performance of NDS1

Most governments face significant challenges in developing a robust monitoring and evaluation (M&E) framework to achieve their desired results. In order for monitoring and follow-up on targets, the SPMS must and will include the essential success components of the institutional culture, institutional capacity and coordination among government units as these components should work effectively as follows:

- **Institutional culture:** Although there are several initiatives to increase the effectiveness of government performance in Qatar, the level varies from one entity to another. Using Key Performance Indicators (SKPIs) in performance management is relatively new and varies between one entity and the other. Monitoring organizational performance in the public and government sector is somewhat modest in most countries, and performance is rarely reviewed and rectified effectively and timely. This is also the case even in institutions that have advanced M&E capabilities, which is often due to increased complexity of efforts exerted by these actors in measuring performance and providing timely and high-quality data.
- **Building the capacity:** The capacity of the MDPS's NDS Performance Measurement Unit and other operational departments should be strengthened to engage in performance monitoring and evaluation in a results-oriented manner. As demonstrated by the performance review of the NDS-1, the systematic methodologies of performance measurement were often different. A challenge was to know the causality of the declined performance of some projects, as well as the difficulty of measuring a number of targets although there were some practical indicators to measure some outcomes and outputs.
- **Government coordination:** In addition to the foregoing, a major challenge to performance measurement is weak coordination mechanisms among ministries and government agencies. The procedures designed to monitor the implementation of the NDS-1 were relatively recent and a major cause of poor government coordination was the absence of an institutional framework for monitoring performance throughout the government.

3. SPMS

Proposed approach: Targets and basic design

The aim of this section is to develop a robust and simple system to monitor the progress achieved in the NDS-2 which will be relatively easy to deal with where it will provide basic information on the main priorities of national development strategies in an effective and result-based manner. The SPMS must also be able to evolve and expand based on decision makers' requirements, as it will need to overcome or mitigate the various challenges referred to above as it should succeed and work effectively in light of available resources.

The NDS-2 SPMS will be structured around three key elements:

- 1. Central monitoring process:** It is centered on an electronic dashboard that will be regularly published & updated to key officials and decision makers. Emphasis will be placed on the top 5-8 or more priorities under the umbrella of NDS-2 and a limited number of associated KPIs. These priorities are usually cross-cutting and based on the analysis of time-series results and they will be monitored on a monthly basis.
- 2. Comprehensive mid-term performance assessment:** this will highlight more comprehensively the progress made in the NDS-2 (2018-2022) as a whole. This process will achieve two main targets: First, ensuring that all ministries, entities and departments are prepared to follow-up on and monitor their progress, which will be of a particular importance to NDS-2 (2018-2022) priorities (specifically those that were not followed-up on centrally and monitored on a monthly basis). Second, providing an opportunity for corrective actions and interventions halfway through.
- 3. Thorough coordination to support the evaluation process** by launching a map of strategic KPIs simultaneously to ensure that all stakeholders have identified and posted the KPIs on their websites and that they update them routinely and regularly

4. NDS-2 monitoring, follow-up and evaluation mechanism

Monitoring and following-up NDS-2 performance is dependent on the following:

1. National level dashboards platform

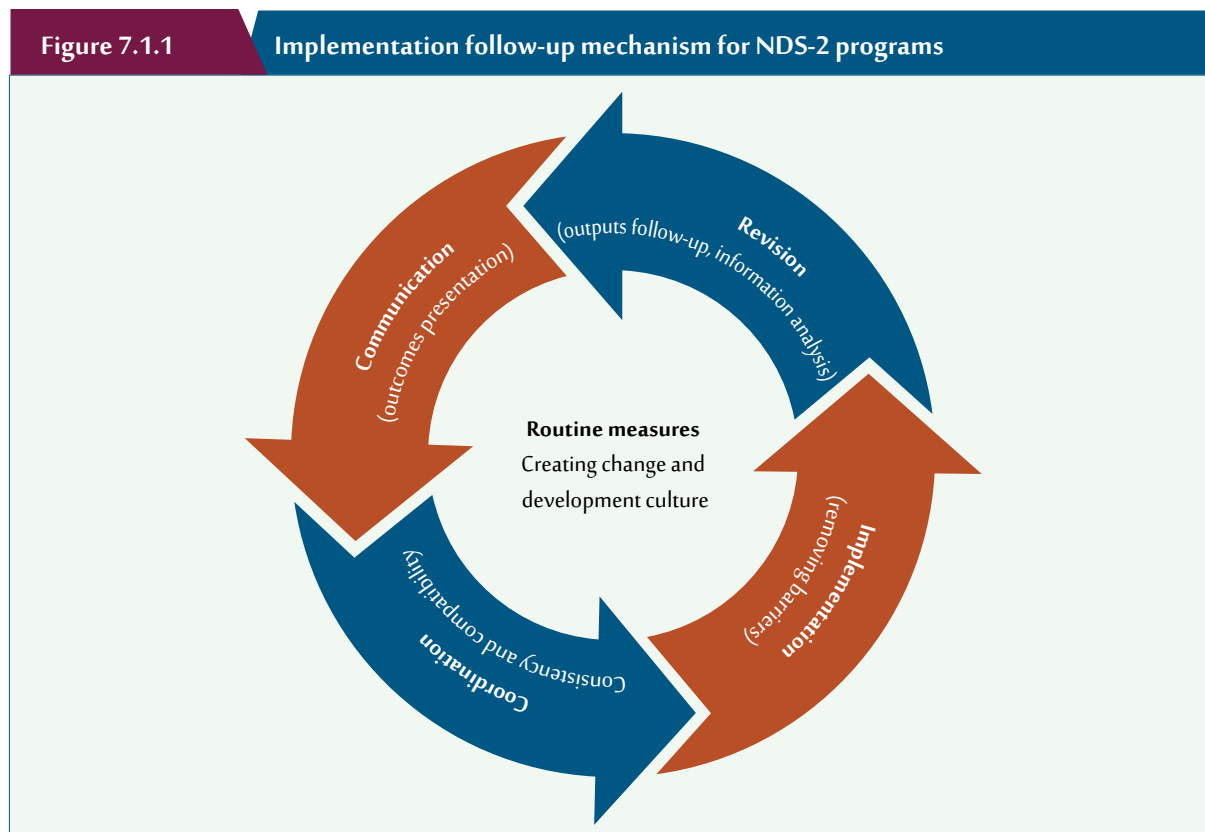
In line with international best practices, the central monitoring function, which revolves around the KPI dashboard, has been designed and will be updated and distributed to officials and decision makers on a regular basis. The focus will be on the top 5-8 priorities under the NDS-2 (2018-2022) that will be ratified by the Council of Ministers. These programs will have limited number of relevant KPIs, which will not exceed 15-20 indicators. These programs are usually cross-cutting and overlapping and their implementation involve the participation of several actors. Accordingly, emphasis will be placed on major NDS-2 priorities that are beyond the ministerial boundaries (a lead agency will be identified for each). These actors will be chosen by identifying the key actions that the government will need to achieve the KPIs. The KPIs will be monitored on a monthly basis wherever possible and on a quarterly basis in all cases.

In addition to focusing on 5-8 priorities and related KPIs, the dashboard will also include additional programs and KPIs reflecting other dimensions of the NDS-2 in a periodical and rotating manner, which will enable the Council of Ministers to review progress in areas other than those routinely followed-up on. In addition to dashboards, the SPMS, at any time, will provide governmental central regulatory bodies with the ability to access information on progress made in other ministries

and departments towards the objectives of the NDS-2 on a specialized basis as per the nature of the project. It must be acknowledged that all entities will be responsible for following-up on their progress in other priorities and projects that would have identified by the government. These projects may be placed outside the current and planned projects matrix, to ensure flexible planning and implementation and regularly manage performance.

2. Comprehensive mid-term review of NDS-2 performance

To provide greater assurance and confidence to decision makers, all the strategic objectives of the NDS-2 (2018-2022) will be reviewed and monitored. This review will highlight the progress in the NDS-2 as a whole in a more comprehensive manner. The review will achieve two basic objectives: the first is to ensure that all line ministries, agencies and departments are ready to follow-up on and monitor progress, which will be of particular importance to all priorities in the NDS-2 that includes some programmes that will not be followed-up on periodically and monitored, on a regular basis. The second objective is to provide an opportunity to make mid-term corrections and reassess strategic priorities in light of recent developments and the current situation.



5. National development strategic plan KPIs¹⁰⁸

This section contains an integrated list of the strategic KPIs proposed by MDPS to measure the implementation performance of the NDS-1 and NDS-2. These KPIs have been designed and developed based on the global experiences available in this regard and the experiences of successful developed countries in measuring strategic performance in consultation with competent World Bank experts.

¹⁰⁸ The M&E team of the NDS-2 has developed these KPIs as a key input to the NDS-2 document.

In addition to the KPIs still in effect and extended from the NDS-1, new and evolutionary strategic KPIs have been developed to reflect the national development priorities in the next phase. This document focuses on high-level strategic KPIs linked to the human, economic, social and environmental development outcomes specific to Qatar, which can be monitored directly by the government, including many of the results to be implemented through multiple ministries. The individual ministries and departments concerned will follow up on and pursue a more detailed and accurate KPI set in accordance with strategic and operational requirements and they will be reflected in the operational plans of these ministries, through which the activities of the NDS-2 will be implemented and the performance of these units will be fully linked.

The NDS-2 performance will be reviewed through regular dashboard reports, which will be conducted at several levels (NDS-2 level, strategic sector level, and level of the relevant ministry). These KPIs will be measured annually, semi-annually, and quarterly (and may be monthly) to measure progress in key NDS-2 projects. The reports will be submitted to the stakeholders that are proposed to meet at least four times a year to review progress. The KPIs contained in the SPMS will remain constant and will be updated every three months. In addition, a periodic set of KPIs to be organized in accordance with major themes and focus areas will be followed-up on, updated annually and recorded with permanent quarterly KPIs. Combined together, these KPIs will provide decision makers with a comprehensive and integrated view on the government's progress against the most pressing development goals.

For illustrative and follow-up purposes, the strategic KPIs have been categorized as follows:

- New strategic KPIs in the NDS-2
- KPIs continuing from the NDS-1
- KPIs KPIs Partially covered in the NDS-1

Table 7.1.1: Other KPIs (to be presented annually)

Focus area	KPIs	Ministry/Line ministries
Economic growth and diversification: GDP and investment	1. Quarterly growth of GDP	MDPS (mainly) MEC
	2. Change in Nonhydrocarbon GDP as a percentage of GDP	
	3. Total factor productivity at the macroeconomic level and in economic sectors (growth as a percentage)	
	4. Total Foreign Direct Investment (FDI), disaggregated by sector	
	5. Gross Capital Formation as a percent of GDP ¹⁰⁹	
Labour force	1. Participation rate of Qataris aged 16-60 in the labor force by gender	MADLSA (mainly) MDPS
	2. Qatari workers as a share of total workers in each sector, disaggregated by gender ¹¹⁰	
	3. Share of the stock of high-skilled expat workers as a % of total expatriates	
Environment	1. Average Air Quality Index, broken down by source ¹¹¹	MME
Financial sustainability	1. Actual revenues versus projections for the fiscal year	MOF
	2. Nonhydrocarbon revenue as a percentage of total revenues	
	3. Growth of actual government expenditure compared to average over the past five years, current year and projections for the next three years	
	4. Shares of expenditure on wages and investment projects	
	5. Projected fiscal surplus/deficit for the current fiscal year	

¹⁰⁹ This metric provides a way to measure the return on capital investments.

¹¹⁰ The percentage of Qataris working in the public and private sectors would also be highlighted in presenting the breakdown of the Qatari labor force by sector.

¹¹¹ The measurement of air quality should include Nitrous Oxides (NOx), Sulphur Dioxide (SO₂), Particulate Matter less than 10 microns or 2.5 microns (PM₁₀ or PM_{2.5}), Carbon Monoxide (CO) and Ozone (O₃).

Table 7.1.1: Other KPIs (to be presented annually)

Focus area	KPIs	Ministry/Line ministries
Public Sector Reform	1. Labour productivity of public sector employees ¹¹²	MADLSA
	2. Size and the increase/decrease of the public sector workforce, disaggregated by nationality (Qataris and non-Qataris)	
	3. Public sector employee absenteeism rates (ratio of hours present against total required hours), broken down by ministry and government agencies	
Transport and communications	1. Severe road accidents disaggregated by gender, age; including both the total number as well as the breakdown per 100,000 population ¹¹³ and per vehicle	MOI MOTC
	2. Road fatalities disaggregated by gender, age, including both the total number as well as the breakdown per 100,000 population	
	3. Average congestion on major roads in Doha: (both as a percentage of their throughput capacity and in terms of congestion-induced delays)	
Water	1. Drinking and TSE water quality index	Kahramaa (mainly) Ashghal
	2. Cost of water production in Qatari riyal per cubic meter and the economic value of water use in various sectors (agricultural, commercial, industrial and residential) ¹¹⁴	
	3. Per capita water consumption	MME MEC
	4. Groundwater depletion per cubic kilometer	

112 The specific metrics used for calculating public sector productivity are still under consideration. As a general rule, while productivity measures are important, they are also notoriously difficult to measure. There are several indices that could serve as proxy KPIs. For example, one could review the actual “time on task” for certain categories of employee or types of employment. Another would be the “tooth to tail” ratio (i.e. the number of front-line staff compared to back-office staff) in selected ministries to understand the extent to which large numbers of support staff are employed. A third possibility would be to review staffing ratios in certain sectors (i.e. number of doctors and nurses per 1,000 population) as compared with OECD and other GCC countries.

113 While aggregate figures make more sense given the small baseline numbers in Qatar, looking at the figures per 100,000 population figures would allow to draw comparisons with global and regional averages.

114 The figures can be used in dollars for international comparisons, while the numbers in Qatari riyal can be used to present domestic trends over time.

Table 7.1.2: Other KPIs (to be presented annually)		
Pillar I: Financial sustainability, improving public sector performance and international cooperation		
Focus area	KPIs	Ministry/Line ministries
Financial sustainability	1. Fiscal breakeven prices	MOF
	2. Adoption of fiscal rules (in later years can be measured by the percentage of hydrocarbon revenues saved for stabilization purposes)	
	3. Growth of total actual government expenditure versus projected expenditure and average expenditure over the past three years	
	4. Publication of the annual budget document containing macroeconomic assumptions (2017-), fiscal risk statement and debt bulletin	
	5. Target spending on asset maintenance as percentage of total spending	
Public financial management	1. Number of ministries/government agencies with annual work plans linked to the State budget to total number of ministries and government agencies	MDPS MOF
	2. Number of ministries work plans that are aligned with the NDS-2 (2018-2022)	
	3. No. of ministries that are in compliance with joint strategic/financial planning policy and the relative weight of each ministry/agency	
Public sector reform	1. Annual increase in Chapter I, disaggregated by ministry/agency and grade level	MADLSA
	2. Number of ministries and government entities using biometric verification systems to track absenteeism rates	
	3. Number of ministries that have developed and disseminated job descriptions and skills required for vacant and occupied posts	
	4. Percentage of Qataris trained annually	
International cooperation	1. Qatar's contribution for development financing in the countries benefiting from development assistance	MOFA
	2. Number of Qataris working and seconded for international organizations	
	3. Degree of national entities interaction with international cooperation at the national level	

Table 7.1.3: Other KPIs (to be presented annually)
Pillar II: Energy, water, infrastructure and environment

Focus area	KPIs	Ministry/Line ministries
Energy and environment	1. Energy intensity, compared cross sectors ¹¹⁵	MOE (mainly) MME (mainly)
	2. Per capita electricity consumption, benchmarked against other GCC countries, and compared to previous periods in Qatar	
	3. Electricity tariff versus the total cost of supply, including average cost of production, consumption and international prices.	
	4. Percentage of renewable energy generation capacity in the overall electricity portfolio	
	5. CO2 emissions (in tons) from burning oil, coal and gas for energy use on both a per capita basis and broken down by sectors	
Water and food	1. The percentage losses in the system, broken down by both water and waste water/sewerage	Kahramaa Ashghal
	2. Proportion of wastewater treated and Treated Sewage Effluent (TSE) reused across sectors	
	3. Progress towards food self-sufficiency targets	MME MEC
Infrastructure and public investment management in infrastructure projects	1. Percent of major Public Investment Projects (PIPs) that are clearly linked to NDS and QNV priorities and have been vetted through an economic cost-benefit analysis	MOF (mainly) multiple line ministries
	2. Percent of major PIPs for which future asset maintenance needs have been estimated	
	3. Rate of compliance with the timeline and cost projections of the original project plan ¹¹⁶	
	4. Evaluating the developmental impact of major investment projects ¹¹⁷	

¹¹⁵ Energy intensity is a measure of energy efficiency in a nation's economy. It usually compares the proportion of Total Primary Energy Supply (in equivalent oil tone or joule) to GDP (measured by Purchasing Power Parity in constant US dollar prices). It can also be used to measure energy efficiency in a particular economic sector in the production of a unit of output.

¹¹⁶ The proposed KPI could be difficult to measure given the large number of public investment projects in the country. If an accurate and up to date project database exists, it would be possible to provide a comprehensive assessment. If it does not, then consider two options. The first would be to prepare a representative sample of projects that matches the broader PIM portfolio and track their progress. The second would be to focus upon a limited number of transformative projects.

¹¹⁷ This KPI has been flagged for further review. The full development impact of projects is often difficult to assess until several years after they have been completed, which would not serve the purpose of enhancing the 2018-2022 NDS strategy. However, ex-post evaluations of the developmental impacts of past projects should be an integral part of the broader project cycle, at least for major projects.

Table 7.1.4: Other KPIs (to be presented annually)		
Pillar III: Economic growth and diversification, transport and communications		
Focus area	KPIs	Ministry/Line ministries
Economic growth and diversification: GDP and investment	1. Total volume of nonhydrocarbon exports	MEC
	2. Share of products in export market that survive past their first year	
	3. Share of Foreign Direct Investment (FDI) that is efficiency seeking ¹¹⁸	
	4. Growth in tourism, including both the annual number of passengers coming through Hamad International Airport and the number of tourists spending more than 24 hours in Qatar	
	5. Doing Business Distance-to-Frontier (DTF) scores (ease of doing business)	
Fostering a knowledge-based economy	1. New science and engineering per 1,000 population aged 20-29 (disaggregated by Qataris vs. non-Qataris, and gender)	MDPS (MEHE, QU, MADLSA)
	2. Return on Investment for KBE through: a- Research and Development expenditure as a percentage of GDP; b- Return from Knowledge-Based activities conducted in Qatar.	
	3. Employment in medium to high-tech services and manufacturing as a percentage of total employment	
	4. Total patents issued to Qatar	
Transport	1. Share of population of the greater Doha metropolitan area using public vs. private transit disaggregated by mode (metro versus bus) and by Qataris and non-Qataris	MOTC (mainly)
	2. Fuel prices in Qatar compared to global levels	
	3. Average overall cost of road trucking/ton x km	
	4. Liner Shipping Connectivity Index (LSCI)	

118 "Efficiency seeking FDI" is that which comes into a country seeking to benefit from factors that enable it to compete in international markets. It is particularly important for countries looking to integrate into the global economy and move up the value chain.

Table 7.1.5: Other KPIs (to be presented annually)

Pillar IV: Health, drugs, education, sports, culture, social solidarity, social protection, population structure and family cohesion

Focus area	KPIs	Ministry/ Line Ministry
Health	1. Incidence of adolescent obesity among adolescents, disaggregated by Qataris and non-Qataris, using Body Mass Index (BMI)	MOPH
	2. Rate of exclusive breastfeeding of children at six months of age, disaggregated by Qataris and non-Qataris	
	3. Change in primary health facilities use, disaggregated by Qataris and non-Qataris	
	4. Change in non-urgent treatment at hospital emergency care units, disaggregated by Qatari and non-Qatari	
	5. Patient satisfaction surveys on quality of health service delivery	
	6. Number of beds per 1,000 population and the average cost per hospital bed use, disaggregated by Qatari and non-Qatari	
	7. Average length of stay in the hospital, disaggregated by Qatari and non-Qatari	
	8. Aggregated expenditure upon medical care abroad and aggregate per capita expenditure across the Qatari population.	
	9. Number of physicians per 1,000 population	
	10. Private sector market share (%) of healthcare sector.	
	11. Percentage of patients admitted to Emergency Department examined, treated and discharged from Emergency Department within 4 hours, disaggregated by Qataris and Non-Qataris.	
	12. Percentage of premature mortality from cardiovascular diseases, cancer, diabetes and chronic respiratory diseases, disaggregated by Qataris and Non-Qataris.	
	13. Percentage of the reduction of healthcare acquired infections (HCAI), in accordance with international best practice, disaggregated by Qataris and Non-Qataris.	
Drugs	1. Number of youth reached by drug prevention campaigns	MOI
	2. Number of drug-users treated, including those with relapsed treatment	MOPH

Table 7.1.5: Other KPIs (to be presented annually)		
Pillar IV: Health, drugs, education, sports, culture, social solidarity, social protection, population structure and family cohesion		
Focus area	KPIs	Ministry/ Line Ministry
Education	1. Gross Enrolment Ratio in KG1 and KG 2 (4 and 5 year olds), disaggregated by gender, by school (public versus non-public) and by Qataris and non-Qataris	
	2. Results in PIRLS, PISA and TIMSS international assessments, disaggregated by gender, by school (public versus non-public) and by Qatari and non-Qatari, including the percentage of Qatari students meeting international benchmarks.	
	3. Qatar Comprehensive Educational Assessment (QCEA) for Grades 6, 9, and 12, broken down by gender, by school (public versus Arabic private schools) and by Qataris and non-Qataris	MEHE
	4. Average absenteeism rates disaggregated by education level (primary, middle, secondary), type of school (public vs non-public), and Qataris vs. non-Qataris ¹¹⁹	
	5. Enrolment rate in Post-secondary education (including TVET, disaggregated by gender and Qataris vs. non-Qataris	
	6. Teacher Efficiency	
Sport	1. Number of Qataris registered with youth and adult sports federations, disaggregated by gender	MOCS
	2. Number of Qatari Olympic and professional athletes ¹²⁰	
	3. Percentage of Qataris and non-Qataris who engaging in at least 150 minutes of moderate-intensity physical activity weekly	
Culture	1. Number of Qataris and non-Qataris visiting museums and other selected cultural events, such as theatrical performances and music festivals	MOCS
	2. Number of Qatari artists, writers and performers recognized internationally through awards and prizes	
	3. Developing national standards for measuring religious and behavioral balance	

119 Attendance could potentially be tracked on a quarterly basis.

120 This metric should include only those professional athletes who compete on a full-time basis.

Table 7.1.5: Other KPIs (to be presented annually)

Pillar IV: Health, drugs, education, sports, culture, social solidarity, social protection, population structure and family cohesion

Focus area	KPIs	Ministry/ Line Ministry
Social solidarity	1. Genuine Savings estimate (which provides a measure of inter-generational equity)	MADLSA
	2. Percentage of women and men occupying critical positions (directors, legislators, managers, etc.), disaggregated by Qataris vs. non-Qataris	MOF
Social protection and demographic composition	1. Qatari population aged 65 and above (as a percentage of total population)	MADLSA MDPS
	2. Growth rate of Qatari and non-Qatari population (annual percentage)	
	3. Growth rate of Qatari and non-Qatari population by key age groups (15-24; 25-64; 65+)	
	4. Number of “graduates” from the social assistance systems / Number of overall beneficiaries of the social assistance systems	
	5. The average total number of years that Qatari workers contribute to a pension scheme before they retire, and the average total number of years Qataris benefit from a pension	
	6. Average effective retirement age and remaining life expectancy at effective retirement age, disaggregated by gender	
Family cohesion	1. Pro-natal policy: Fertility rate for Qatari women, general (total number of live births per 1,000 women of reproductive age, typically aged 16-55 in a population)	MDPS
	2. Qatari divorce rate (number of divorces per 1,000 married populations) ¹²¹	

6. Conclusion

The NDS-2 (2018-2022) performance management process represents a significant shift in the performance measurement culture for different sectors, and the related KPI map constitutes an objective-based approach for measuring progress on the various strategic priorities. It also provides an objective comparison of performance development based on periodic real-time information (monthly/quarterly/yearly). These KPIs are significantly important as they are based on international performance measurement standards that are subject to previously identified criteria, allowing the performance of Qatar to be compared to other countries globally and regionally in various areas of development.

¹²¹ Another indicator is the ratio of divorce to marriage (number of divorce cases to the number of marriages in a particular year).